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AUTHOR	Syhlman, William D.
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IDENTIFIERS	Distributive Education Clubs of America; Entrepreneurs

ABSTRACT

These distributive education training and development plans for secondary-level programs provide lists of competencies a student needs to hold a job in sales and marketing occupational areas. The design of the training plans is based on a "pyramid" which incorporates the following five sections or levels of competencies (from general to specific): large group basic, small group occupational code, individual special code, DECA (Distributive Education Clubs of America), and on-the-job-individual competencies which may be identified by the coordinator or employer. Each of the training plans follows this format: name and occupational code, occupational description, sample job tasks and responsibilities, and competency checklists upon which are to be indicated the means of mastering the competencies (the five levels of the pyramid), and a final student evaluation form to scale traits and work habits/abilities. The twenty-two areas are advertising and display services; apparel and accessories marketing; vehicles and accessories marketing; finance and credit services; floristry, farm, and garden materials marketing; food marketing; food services marketing; general merchandise retailing; hardware and building supplies marketing; home furnishings marketing; hotel, motel, and lodging services; industrial and institutional marketing; insurance; international marketing; personal services marketing; petroleum marketing; real estate marketing; recreational marketing; transportation and travel marketing; business services marketing; business ownership (entrepreneurship); and general marketing. (YLB)

ED185388

DESIGNING TRAINING PLANS FOR DISTRIBUTIVE EDUCATION

FINAL REPORT

Project No. 78-AWH(014)

Exemplary Project in Vocational Education
Conducted Under
Public Law 90-576

William D Syhlman
School of Business
Eastern Washington University
Cheney, Washington 99004

U.S. DEPARTMENT OF HEALTH.
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CE 024 995

RESEARCH COORDINATING UNIT
Washington State Commission for Vocational Education

Distributive Education Training and Development Plan

SALES AND MARKETING

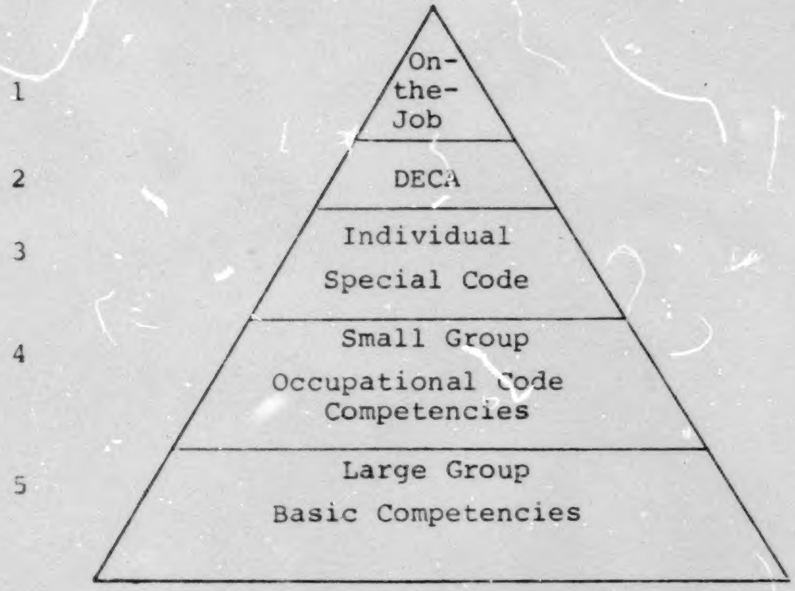
Advertising and Display Services

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1:	Individual competencies; some identified and some written in by employer or coordinator
Section 2:	Competencies gained through DECA participation
Section 3:	Competencies needed by this student only
Section 4:	Competencies needed by a small group of students in the same occupational area (such as food service)
Section 5:	Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, post-secondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.01 Advertising and Display Services

Student ______________________________

Job Title ____________________________

Occupational Description:

The tasks of planning, development, placement, and installation, and evaluation are performed by employees and management personnel in Advertising and Display Services. They create demand and promote sales through displays, merchandising aids, and mass media. They may work for (and with) advertising agencies, display houses, retail and wholesale establishments, production industries, and print and broadcast media.

Sample job tasks and responsibilities:

ADVERTISING

advertise service/agency
prepare advertisements
run advertisements

COMMUNICATIONS

answer questions
give product information

DISPLAY

prepare counter displays
know classifications of displays
clear old props and materials
return merchandise to proper department(s)
select merchandise
complete price tickets and show cards
collect merchandise and accessories
clean stockroom
rotate worn materials
run errands
take proper care of equipment (fixtures, mannequins)

DISPLAY (cont.)

prepare window displays:
  wash windows
  clean and vacuum floor
  dust props
  background preparation
  complete displays
  dress mannequins
  check lighting
  dismantle display

HUMAN RELATIONS

face new situations
work with others
accept criticism
overcome personal feelings about advertising/display
accept and give directions
be of assistance to others

SELLING

learn sales cycle and techniques
sell merchandise
know competitive selling practices
sell ad space or time
negotiate advertising contracts

MATHEMATICS

figure ad size and costs
figure discounts on ads
record costs of ad
figure markdowns on merchandise
work within budget

MERCHANDISING

stock shelves
reorder merchandise
mark and label merchandise

OPERATIONS AND MANAGEMENT

convert copy and art work into print
work with photography
develop ways of phrasing and create word pictures
select proper words
work within advertising budget
establish advertising goals
determine how to measure results
determine appropriate advertising medium for message

4.01 Advertising and Display Services

OPERATIONS AND MANAGEMENT (cont.)

understand operation of various advertising media
conduct research studies
work with print advertising:
  develop headlines
  schedule advertising
  determine size/shape of ad
  use illustrations and drawings
  use correct materials
  prepare paste-up
  prepare rough
  check copy and layout
work with outdoor advertising:
  be aware of potential sites
  arrange for site use
  prepare advertisement
work with broadcast advertising:
  determine costs of ad
  determine length of ad
  determine time to run ad
  decide type of message (spot, sponsorship,etc.)
  decide on local or national use
  write copy
  prepare visuals
work with direct advertising:
  prepare mailing lists
  prepare letters/brochures

PRODUCT AND SERVICE TECHNOLOGY

learn brand names
know printing classifications
know methods of setting type

PRODUCT AND SERVICE TECHNOLOGY (cont.)

know types of engraving and printing
know elements of good copy
be aware of regulations on advertising
know postal rules and regulations

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	advertise service/agency						
	prepare advertisements						
	run advertisements						
	other: ______________________						
	______________________						
	COMMUNICATIONS						
	Ability to:						
	answer questions						
	give product information						
	other: ______________________						
	______________________						
	DISPLAY						
	Ability to:						
	prepare counter displays						
	know classifications of displays						
	clear old props and materials						
	return merchandise to proper department(s)						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY (cont.)						
	select merchandise for display						
	complete price tickets and show cards						
	collect merchandise and accessories						
	clean stockroom						
	rotate worn materials						
	run errands						
	take proper care of equipment (i.e. fixtures, mannequins)						
	prepare window displays						
	-wash windows						
	-clean and vacuum floor						
	-dust props						
	-prepare background						
	-complete displays						
	-dress mannequins						
	-check lighting						
	-dismantle display						
	other: ________________						
	________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	HUMAN RELATIONS						
	Ability to:						
	face new situations						
	work with others						
	accept criticism						
	be objective -- overcome personal feelings about advertising/display						
	accept and give directions						
	be of assistance to others						
	other: ____________________						
	____________________						
	SELLING						
	Ability to:						
	learn sales cycle and techniques						
	sell merchandise						
	know competitive selling practices						
	sell ad space or time						
	negotiate advertising contracts						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MATHEMATICS						
	Ability to:						
	figure ad size and costs						
	figure discounts on ads						
	record costs of ads						
	figure markdowns on merchandise						
	work within budget						
	other: ____________________						
	____________________						
	MERCHANDISING						
	Ability to:						
	stock shelves						
	reorder merchandise						
	mark and label merchandise						
	other: ____________________						
	____________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	convert copy and art work into print						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	work with photography						
	work within advertising budget						
	develop ways of phrasing and create word pictures						
	select proper words						
	establish advertising goals						
	determine how to measure results						
	determine appropriate advertising medium for message						
	understand operation of various advertising media						
	conduct research studies						
	work with print advertising						
	-develop headlines						
	-schedule advertising						
	-determine size/shape of ad						
	-use illustrations and drawings						
	-use correct materials						
	-prepare paste-up						
	-prepare rough						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	-check copy and layout						
	work with outdoor advertising						
	-be aware of potential sites						
	-arrange for site use						
	-prepare advertisements						
	work with broadcast advertising						
	-determine costs of ad						
	-determine length of ad						
	-determine time to run ad						
	-decide type of message (spot, sponsorship, etc.)						
	-decide on local or national use						
	-write copy						
	-prepare visuals						
	work with direct advertising						
	-prepare mailing lists						
	-prepare letters/brochures						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	PRODUCT SERVICE AND TECHNOLOGY						
	Ability to:						
	learn brand names						
	know printing classifications						
	know methods of setting type						
	know types of engraving and printing						
	know elements of good copy						
	be aware of regulations on advertising						
	know postal rules and regulations						
	other: ______________________						
	______________________						
	OTHER						
	______________________						
	______________________						
	______________________						
	______________________						
	______________________						

04.01
11

FINAL EVALUATION FORM

Student ____________________

Training Station ____________________

Supervisor ____________________

Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

____

Traits which could be improved: ____________________

____

Ways in which student has improved: ____________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

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WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

____

Work Habits which could be improved: ____________________

____

Work Habits/Abilities which have improved: ____________________

____

Overall Evaluation:

____ excellent
____ above average
____ average
____ below average
____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

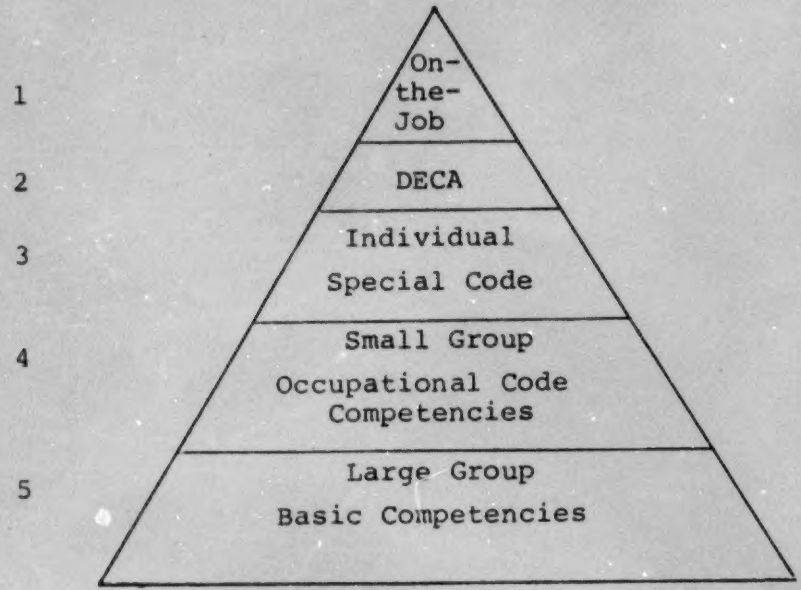
Apparel and Accessories Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



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Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.02 Apparel and Accessories Marketing

Student_______________________________

Job Title_____________________________

Occupational Description:

Employees in apparel and accessories marketing perform marketing functions and tasks in retail, wholesale, and manufacturing establishments primarily engaged in marketing clothing of all kinds, including related articles for personal wear and adornment.

ADVERTISING

know basic advertising fundamentals
know styles of advertising
prepare layouts
prepare promotions
stay within budget
know medias available
know what to advertise

COMMUNICATIONS

communicate clearly
use store language (terms)
use telephone
use intercoms
give directions

DISPLAY

know basic display fundamentals and styles
prepare displays
utilize seasonal displays
utilize promotional displays
use mannequins

HUMAN RELATIONS

refer customer problems to proper personnel
refer customer wants and special orders
work well with others

HUMAN RELATIONS (cont.)

handle emergency situations (i.e. robberies, etc.)
display personality traits of responsibility, alertness, and outgoing nature

SELLING

know sales steps and technique
answer questions/objections
be familiar with merchandise style, quality, etc.
size people as to needs
place catalog orders
sell merchandise

MATHEMATICS

handle sales discounts
handle employee sales
work with markdowns
complete pricing (markups)
make change
handle charges (store/bankcard)
handle refunds, overrings, lay-a-ways
prepare sales slips
count out (at end of day)

MERCHANDISING

check in stock
make routine stock counts
fill in stock
reorder stock
straighten stock and maintain appearance of area
take periodic inventories
process damaged freight
mark items

OPERATIONS AND MANAGEMENT

be aware of shoplifting problem
assist in training others
know bookkeeping procedures
operate cash register
open and close store
be aware of peak seasons
be aware of promotions
know business organization
know store policies

PRODUCT AND SERVICE TECHNOLOGY

know fabric content and wearability
know fashion trends
know how to do alterations

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	know basic advertising fundamentals						
	know styles of advertising						
	prepare layouts						
	prepare promotions						
	stay within budget						
	know medias available						
	know what to advertise						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	communicate clearly						
	use store language (terminology)						
	use telephone						
	use intercoms						
	give directions						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY						
	Ability to:						
	know basic display fundamentals and styles						
	prepare displays						
	utilize seasonal displays						
	utilize promotional displays						
	use mannequins						
	other: ______________________________						
	______________________________						
	HUMAN RELATIONS						
	Ability to:						
	refer customer problems to proper personnel						
	refer customer wants and special orders						
	work well with others						
	handle emergency situations (i.e. robberies, etc.)						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	HUMAN RELATIONS (cont.)						
	display personality traits including:						
	-responsibility						
	-alertness						
	-outgoing nature						
	other: ____________________						
	____________________						
	SELLING						
	Ability to:						
	know sales steps and techniques						
	answer questions/objections						
	be familiar with merchandise style, quality, etc.						
	size people as to needs						
	place catalog orders						
	sell merchandise						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MATHEMATICS						
	Ability to:						
	handle sales discounts						
	handle employee sales						
	work with markdowns (sales)						
	work with markups (pricing)						
	make change						
	handle charges (store/bankcards)						
	handle refunds, overrings, lay-aways						
	prepare sales slips						
	count out (at end of day)						
	other: ______________________________						
	____________________________________						
	MERCHANDISING						
	Ability to:						
	check in stock						
	make routine stock counts						
	fill in stock						
	reorder stock						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MERCHANDISING (cont.)						
	straighten stock						
	maintain appearance of sales area						
	take periodic inventories						
	process damaged freight						
	mark items						
	other: ______________________________						
	____________________________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	be aware of shoplifting problem						
	assist in training others						
	know bookkeeping procedures						
	operate cash register						
	open and close store						
	be aware of peak seasons						
	be aware of promotions						
	know business organization						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	know store policies						
	other: ____________						
	____________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know fabric content and wearability						
	know fashion trends						
	know how to do alterations						
	other: ____________						
	____________						
	OTHER:						
	____________						
	____________						
	____________						
	____________						
	____________						

04.02

FINAL EVALUATION FORM

Student ______________________________ 8

Training Station ______________________________

Supervisor ______________________________

Date ______________________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10 9 8 7 6 5 4 3 2 1 0 n/a
Promptness	10 9 8 7 6 5 4 3 2 1 0 n/a
Cooperation	10 9 8 7 6 5 4 3 2 1 0 n/a
Sincere/Dependable	10 9 8 7 6 5 4 3 2 1 0 n/a
Interest/Attitudes	10 9 8 7 6 5 4 3 2 1 0 n/a
Courtesy/Tact	10 9 8 7 6 5 4 3 2 1 0 n/a
Self confidence	10 9 8 7 6 5 4 3 2 1 0 n/a
Attendance	10 9 8 7 6 5 4 3 2 1 0 n/a

Traits especially strong: ______________________________

____

Traits which could be improved: ______________________________

____

Ways in which student has improved: ______________________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

WORK HABITS/ABILITIES

Speed/Amount of Work	10 9 8 7 6 5 4 3 2 1 0 n/a
Follows Directions	10 9 8 7 6 5 4 3 2 1 0 n/a
Accuracy	10 9 8 7 6 5 4 3 2 1 0 n/a
Works without supervision	10 9 8 7 6 5 4 3 2 1 0 n/a
Takes Suggestions	10 9 8 7 6 5 4 3 2 1 0 n/a
Selling	10 9 8 7 6 5 4 3 2 1 0 n/a
Cash Register	10 9 8 7 6 5 4 3 2 1 0 n/a
Stocking	10 9 8 7 6 5 4 3 2 1 0 n/a
Human Relations	10 9 8 7 6 5 4 3 2 1 0 n/a
Merchandise Math	10 9 8 7 6 5 4 3 2 1 0 n/a

Work Habits especially strong: ______________________________

____

Work Habits which could be improved: ______________________________

____

Work Habits/Abilities which have improved: ______________________________

____

Overall Evaluation:
- ____ excellent
- ____ above average
- ____ average
- ____ below average
- ____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

Vehicles and Accessories Marketing

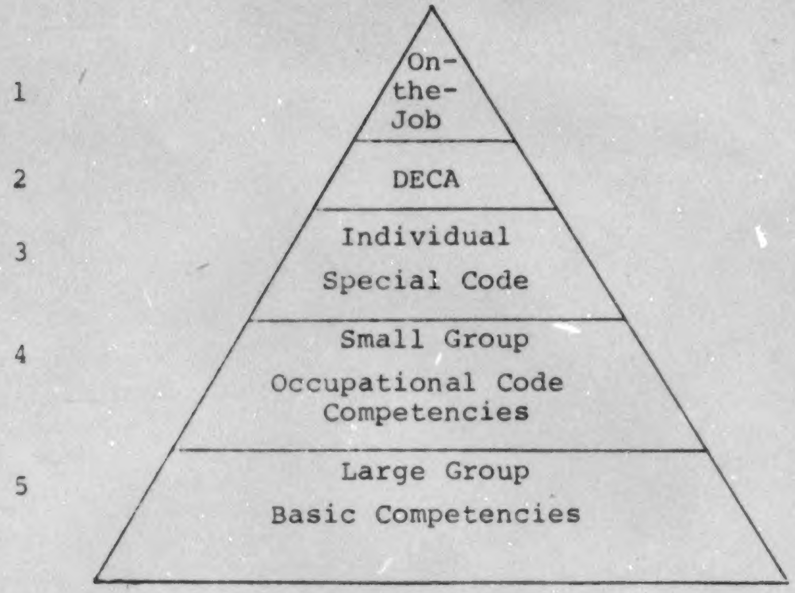
Automotive, Recreational, Agricultural

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1: Individual competencies; some identified and some written in by employer or coordinator

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Section 5: Competencies needed by all students; general skills

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Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.03 Automotive, Recreational, And Agricultural Vehicles and Accessories Marketing

Student ______________________

Job Title ______________________

Occupational Description:

Employees in these areas provide customer services, perform related tasks to achieve maximum sales volume, encourage customer loyalty, and work in various assigned tasks and fields.

Sample job tasks and responsibilities:

ADVERTISING

- prepare ad layout
- general advertising background

COMMUNICATION

- proper communication procedures
- use courtesy

DISPLAY

- coordinate colors
- use display techniques
- prepare displays

HUMAN RELATIONS

- negotiate and communicate well with customers
- refer customers properly
- deal with the public
- get along with others

SELLING

- complete charge slips
- fill out charge cards
- handle refunds
- handle associate/employee sales

MATHEMATICS

- make change
- handle sales discounts
- use business math (add, subtract, multiply, divide, percentages)

MERCHANDISING

- stock inventory
- reorder merchandise
- straighten sales and inventory area
- take inventory
- clean

OPERATIONS AND MANAGEMENT

- schedule appointments
- estimate time required for service
- have mechanical knowledge necessary for job
- good use of hands/dexterity
- have driver's license
- read blueprints
- use test instruments
- weld
- utilize parts catalog
- locate parts and tools
- read charts and manuals

PRODUCT AND SERVICE TECHNOLOGY

- know types of services available
- know names and location of vehicles/parts/accessories
- know pricing structure

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	prepare layout						
	general advertising background						
	other: ______________________						
	______________________						
	COMMUNICATION						
	Ability to:						
	use proper communication procedures						
	use courtesy in dealing with people						
	other: ______________________						
	______________________						
	DISPLAY						
	Ability to:						
	coordinate colors						
	use display techniques						
	prepare displays						
	other: ______________________						
	______________________						

04-03

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	HUMAN RELATIONS						
	Ability to:						
	negotiate and communicate well with customers						
	refer customers properly						
	deal with the public						
	get along with others						
	other: ____________________						
	____________________						
	SELLING						
	Ability to:						
	complete charge slips						
	fill out charge cards						
	handle refunds						
	handle employee sales						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MATHEMATICS						
	Ability to:						
	make change						
	handle sales discounts						
	use business math (addition, subtraction, multiplication, division)						
	figure percentages						
	other: ____________________						
	____________________						
	MERCHANDISING						
	Ability to:						
	stock inventory						
	reorder merchandise						
	straighten sales and inventory area						
	take inventory						
	clean						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	schedule appointments						
	estimate time required for service						
	have mechanical knowledge necessary for job						
	good use of hands/dexterity						
	have driver's license						
	read blueprints						
	use test instruments						
	weld						
	utilize parts catalog						
	locate parts and tools						
	read charts and manuals						
	other: ______________________						
	______________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know types of services available						
	know names and location of vehicles/ parts/accessories						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	PRODUCT AND SERVICE TECHNOLOGY (cont.)						
	know pricing structure						
	other: ____________________						
	____________________						
	OTHER:						
	____________________						
	____________________						
	____________________						
	____________________						
	____________________						

FINAL EVALUATION FORM

Student ______________________
Training Station ______________________
Supervisor ______________________
Date ______________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

---

TRAITS

Appearance	10 9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10 9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10 9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10 9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10 9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10 9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10 9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10 9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ______________________

Traits which could be improved: ______________________

Ways in which student has improved: ______________________

Confidential remarks and additional comments:
(May be continued on reverse side)

WORK HABITS/ABILITIES

Speed/Amount of Work	10 9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10 9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10 9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10 9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10 9	8	7	6	5	4	3	2	1	0	n/a
Selling	10 9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10 9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10 9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10 9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10 9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ______________________

Work Habits which could be improved: ______________________

Work Habits/Abilities which have improved: ______________________

Overall Evaluation:
___ excellent
___ above average
___ average
___ below average
___ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

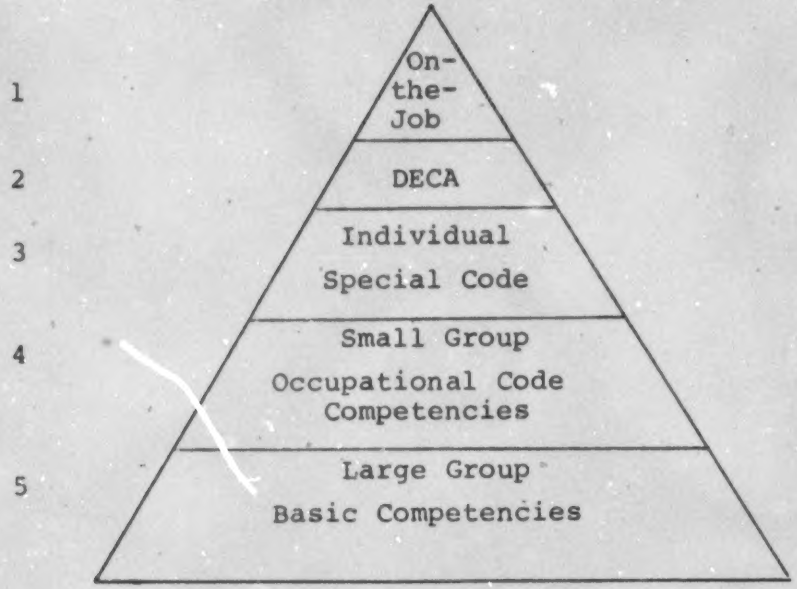
Finance and Credit Services

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID


1
On-the-Job
2
DECA
3
Individual Special Code
4
Small Group Occupational Code Competencies
5
Large Group Basic Competencies

Section 1: Individual competencies; some identified and some written in by employer or coordinator

Section 2: Competencies gained through DECA participation

Section 3: Competencies needed by this student only

Section 4: Competencies needed by a small group of students in the same occupational area (such as food service)

Section 5: Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, post-secondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.04 Finance and Credit Services

Student ______________________

Job Title ______________________

Occupational Description:

This occupational area relates to the marketing functions and tasks performed by employees in various financial institutions. These may be commercial banks, savings and loan associations, credit agencies, credit unions, consumer finance, collection agencies, security and commodity brokerages, and in credit departments in retail and wholesale establishments.

Sample job tasks and responsibilities:

ADVERTISING

design advertising for services
prepare direct-mail advertisements

COMMUNICATIONS

speak well
write legibly
fill out forms: overdue payment, bad check
prepare letters: thank you, close account
place and receive telephone calls regarding checks

DISPLAY

set up displays of checks, covers, seasonal displays
rearrange displays
dismantle displays

HUMAN RELATIONS

deal with peers, management, customers
demonstrate honesty/responsibility/accuracy
be tactful
be cooperative

HUMAN RELATIONS (cont.)

use memory
have pleasant personality

SELLING

use suggestive selling for savings accounts, bonds, deposit boxes, etc.

MATHEMATICS

add, subtract, mutiply, and divide
work with negative and positive balances
work with money (change and bills)

MERCHANDISING

inventory items on display
reorder items on display

OPERATIONS AND MANAGEMENT

explain terms and general information
handle emergency situations
balance at days end
handle deposits and withdrawals

OPERATIONS AND MANAGEMENT (cont.)

distribute charge applications
accept charge card applications
operate computer terminals
work with checks:
  take out bad checks
  cash checks
  check endorsements
  return non-endorsed checks
  file checks after checked
prepare statements:
  assemble checks/statement
  check to make sure amounts correspond
  count number of checks
  mail, if okay
work with accounts:
  make out new accounts
work with securities:
  furnish information from published sources
  take and transmit orders
  notify buyer when transaction is completed
  explain securities

PRODUCT AND SERVICE TECHNOLOGY

be familiar with types of services offered
be familiar with various accounts
know terms and general bank information

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	design advertising for services						
	prepare direct-mail advertisements						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	speak well						
	write legibly						
	fill out forms						
	-overdue payment						
	-bad check						
	prepare letters						
	-thank you						
	-close account						
	place and receive telephone calls regarding checks						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY						
	Ability to:						
	set up displays of checks, covers, or seasonal displays						
	rearrange displays						
	dismantle displays						
	other: ____________________						
	____________________						
	HUMAN RELATIONS						
	Ability to:						
	deal with peers, management, and customers						
	demonstrate honesty, reliability, and accuracy						
	be tactful						
	be cooperative						
	use memory						
	have pleasant personality						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING						
	Ability to:						
	use suggestive selling for savings, other accounts, bonds, deposit boxes, etc.						
	other: ____________________						
	____________________						
	MATHEMATICS						
	Ability to:						
	add, subtract, multiply, & divide						
	work with negative and positive balances						
	work with money (change and bills)						
	other: ____________________						
	____________________						
	MERCHANDISING						
	Ability to:						
	inventory items on display						
	reorder items on display						
	other: ____________________						
	____________________						

			IN-CLASS				
Check if Applies	COMPETENCY	DATE COMP.	LARGE GROUP	SMALL GROUP	IND.	DECA	ON-THE-JOB
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	explain terms and general information						
	handle emergency situations						
	balance at days end						
	handle deposits and withdrawals						
	distribute charge applications						
	accept charge card applications for processing						
	operate computer terminals						
	work with checks						
	-take out bad checks						
	-cash checks						
	-check endorsements						
	-return non-endorsed checks						
	-file checks after checked						
	prepare statements						
	-assemble checks and statement						
	-check to make sure amounts correspond						
	-count number of checks						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	-mail statements, if okay						
	work with accounts						
	-make out new accounts						
	work with securities						
	-furnish information from published sources						
	-take and transmit orders						
	-notify buyer when transaction is completed						
	-explain securities						
	other: ______________________						
	______________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	be familiar with types of services offered						
	be familiar with various accounts						
	know terms and general bank information						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OTHER:						
	____________________						
	____________________						
	____________________						
	____________________						
	____________________						

FINAL EVALUATION FORM

04.04

Student ________________________ 8
Training Station ________________
Supervisor ______________________
Date ____________________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10 9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10 9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10 9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10 9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10 9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10 9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10 9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10 9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

Traits which could be improved: ____________________

Ways in which student has improved: ____________________

Confidential remarks and additional comments:
(May be continued on reverse side)

WORK HABITS/ABILITIES

Speed/Amount of Work	10 9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10 9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10 9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10 9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10 9	8	7	6	5	4	3	2	1	0	n/a
Selling	10 9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10 9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10 9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10 9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10 9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

Work Habits which could be improved: ____________________

Work Habits/Abilities which have improved: ____________________

Overall Evaluation:
____ excellent
____ above average
____ average
____ below average
____ poor

04 05

Distributive Education Training and Development Plan

SALES AND MARKETING

Floristry, Farm and Garden Materials Marketing

DISTRIBUTIVE EDUCATION CLUBS OF AMERICA

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

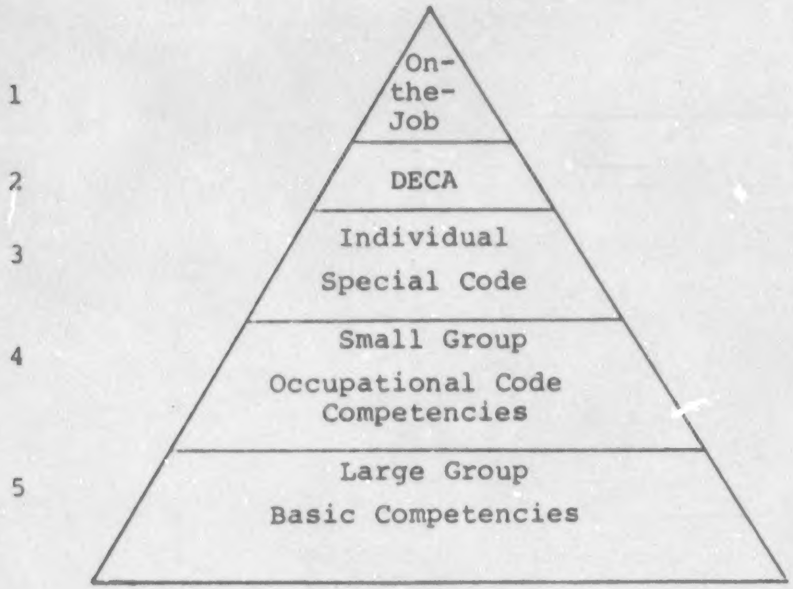
COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

84

85

TRAINING PLAN PYRAMID



Section 1:	Individual competencies; some identified and some written in by employer or coordinator
Section 2:	Competencies gained through DECA participation
Section 3:	Competencies needed by this student only
Section 4:	Competencies needed by a small group of students in the same occupational area (such as food service)
Section 5:	Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

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Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.05 Floristry, Farm and Garden Supplies Marketing

Student ______________________________

Job Title ______________________________

Occupational Description:

People employed in this area do marketing functions and tasks in retail and wholesale establishments dealing with live plants, cut flowers, floral arrangement, artificial flowers, garden supplies, equipment, and related items plus seed, fertilizer, and other supplies for farm production.

Sample job tasks and responsibilities:

ADVERTISING

make signs for store

COMMUNICATION

ability to deal with people
write legibly
speak well

DISPLAY

prepare attractive window displays
prepare attractive in-store displays
use an artistic sense of balance, color, line

HUMAN RELATIONS

deal with hard-to-handle customers
deal with complaints
refer customers to the correct department/store to handle needs
assist in selecting flowers

SELLING

know selling principles
suggest gifts and items to customers

MATHEMATICS

count money
help with billing
figure costs of items
use basic math skills

MERCHANDISING

moniter supplies
help with stocking, reordering, etc.

OPERATIONS AND MANAGEMENT

assemble loose flowers into arrangements for gifts and decorations
cut flowers/plants correctly
create arrangements for various occasions
prune/trim shrubs and trees correctly
straighten flower stems with inserted wire

OPERATIONS AND MANAGEMENT (cont.)

use flowers, greenery, and artificial aids
decorate (tie bows, wrap)
complete work/orders in reasonable time
make deliveries
take orders:
  know information needed
  read other's orders
  know standard orders
  write order up
  take telephone orders
operate cash register:
  count money back
  operate machine
  process cash/charge sales

PRODUCT AND SERVICE TECHNOLOGY

understand physical qualities of flowers/plants/trees
know appropriate flowers for occasions
know/be familiar with equipment (mowers, pruners, etc.)
know/be familiar with farming equipment
be familiar with farming procedures

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	make signs for store						
	other: ____________						
	____________						
	COMMUNICATION						
	Ability to:						
	deal with people						
	write legibly						
	speak well						
	other: ____________						
	____________						
	DISPLAY						
	Ability to:						
	prepare attractive window displays						
	prepare attractive in-store displays						
	use an artistic sense of balance, color, line						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY (cont.)						
	other: ______________________						
	______________________						
	HUMAN RELATIONS						
	Ability to:						
	deal with hard-to-handle customers						
	deal with complaints						
	refer customers to the correct department or store to handle needs						
	assist in selecting flowers						
	other: ______________________						
	______________________						
	SELLING						
	Ability to:						
	know selling principles						
	suggest gifts and items to customers						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MATHEMATICS						
	Ability to:						
	count money						
	help with billing						
	figure costs of items						
	use basic math skills						
	other: ________________						
	________________						
	MERCHANDISING						
	Ability to:						
	moniter supplies						
	help with stocking, reordering, etc.						
	other: ________________						
	________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	assemble loose flowers into arrangements for gifts and decorations						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	cut flowers/plants correctly						
	create arrangements for various occasions						
	prune/trim shrubs and trees correctly						
	straighten flower stems with inserted wire						
	use flowers, greenery, and artificial aids						
	decorate (tie bows/wrap)						
	complete work/orders in reasonable time						
	make deliveries						
	take orders and fill them						
	-know information needed						
	-read other's orders						
	-know standard orders						
	-write order up						
	-take telephone orders						
	operate cash register						
	-count money back						
	-operate machine						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	-process cash sales						
	-process charge sales						
	other: ____________________						
	____________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	understand physical qualities of flowers/plants/trees						
	know appropriate flowers for occasions						
	know/be familiar with equipment (lawn mowers, pruners, sprayers, etc.)						
	know/be familiar with farming equipment						
	be familiar with farming procedures						
	other: ____________________						
	____________________						
	OTHER:						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OTHER: (cont.)						
	____________________						
	____________________						
	____________________						
	____________________						
	____________________						

FINAL EVALUATION FORM

Student ____________________

Training Station ____________________

Supervisor ____________________

Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average		average			below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

Traits which could be improved: ____________________

Ways in which student has improved: ____________________

Confidential remarks and additional comments:
(May be continued on reverse side)

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WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
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Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

Work Habits which could be improved: ____________________

Work Habits/Abilities which have improved: ____________________

Overall Evaluation:

- ____ excellent
- ____ above average
- ____ average
- ____ below average
- ____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

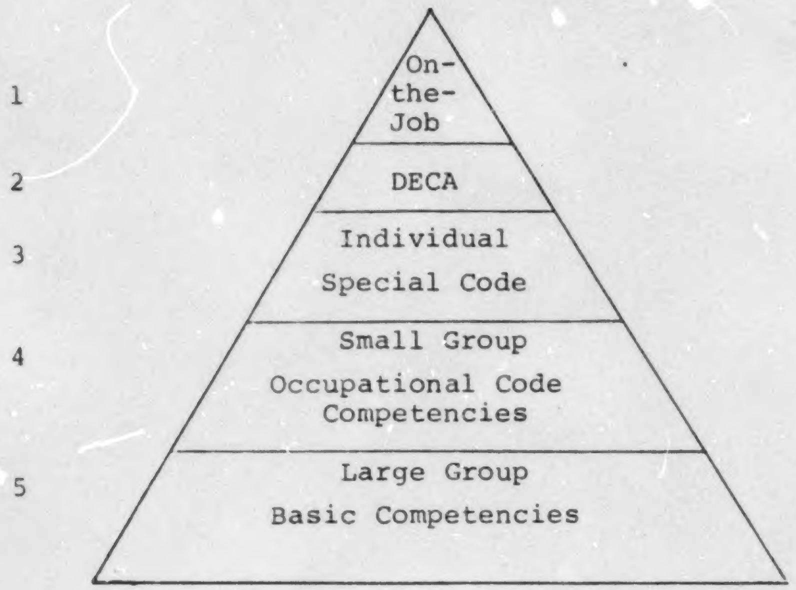
Food Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1: Individual competencies; some identified and some written in by employer or coordinator

Section 2: Competencies gained through DECA participation

Section 3: Competencies needed by this student only

Section 4: Competencies needed by a small group of students in the same occupational area (such as food service)

Section 5: Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, post-secondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.06 Food Marketing

Student ____________________

Job Title ____________________

Occupational Description:

The food marketing employees perform marketing functions and tasks in retail and wholesale establishments and in food processing and manufacturing firms primarily dealing with food products. These food products may be for home use or for commercial and institutional use.

Sample job tasks and responsibilities:

ADVERTISING

- prepare advertisements
- buy ad space/time
- inform employees of sale items
- read competitor's ads

COMMUNICATIONS

- call customers for information
- give directions for finding items in store
- inform customers on store happenings

DISPLAY

- build and maintain displays
- gather merchandise/materials for displays
- clean up after sale
- construct displays in proper area of store
- mark shelves according to displays

HUMAN RELATIONS

- show a friendly attitude
- give demonstrations on product uses/purpose

HUMAN RELATIONS (cont.)

- help customers with special orders

SELLING

- use suggestive selling
- sell correct product for job
- have confident selling manner

MATHEMATICS

- count money
- figure markdowns
- figure employee discounts
- handle refunds/exchanges
- keep books

MERCHANDISING

- check market and keep up on in-coming fads
- stay in competition with competitors
- prepare/take inventory reports
- stock sale merchandise
- mark all merchandise
- order according to demand
- keep precision stock records

OPERATIONS AND MANAGEMENT

- operate cash register:
  - ring up merchandise
  - change tape
  - use proper price and dept.
  - record and report errors to head cashier on proper form
  - handle coupons/gift cert.
  - handle refunds, rain checks, credit sales
  - use weights/measures
  - use price charts
  - work fast/accurately
- keep counter clean
- restock counter items
- get approval on necessary documents
- keep bags stocked
- attend store meetings
- report thefts and pilferage
- report faulty equipment or safety hazards
- perform stocking functions:
  - restock items
  - keep area clean and neat
  - fill orders from stock
  - request more stock
  - lift and carry items
- perform meatcutter functions:
  - prepare meat for sale
  - cut/wrap, and price

OPERATIONS AND MANAGEMENT(cont.)

- weigh meat
- cut meat to order
- know types and cuts
- operate tools

perform bagger functions:
- bag or box items
- carry out to vehicles
- return carts from lot
- clean work areas
- transport empty bottles

perform produce/dairy functions:
- weigh items and bag
- date stock
- rotate stock
- keep items chilled
- discount older merchandise
- learn produce techniques
- moisten produce

perform management functions:
- prepare financial reports
- authorize checks
- use feedback received
- collect supervisor's reports
- hire and fire employees
- implement company policies
- manage finances
- plan, direct, and coordinate store operation
- work with employees
- work with other managers

perform food wholesaler functions:
- service smaller stores
- help stores with advertising
- transport goods
- prepare assortments
- prepare food for shipping

PRODUCT AND SERVICE TECHNOLOGY

Maintain familiarity with store layout to assist customers

have general product knowledge

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	prepare advertisements						
	buy ad space or time						
	inform employees of sale items						
	read competitor's ads						
	other: ______________________						
	______________________						
	COMMUNICATIONS						
	Ability to:						
	call customers for information						
	give directions for finding items in store						
	inform customers on store happenings						
	other: ______________________						
	______________________						
	DISPLAY						
	Ability to:						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY (cont.)						
	build and maintain displays						
	gather merchandise/materials for displays						
	clean up after sales						
	construct displays in proper area of store						
	mark shelves according to displays						
	other: ______________________						
	______________________						
	HUMAN RELATIONS						
	Ability to:						
	show a friendly attitude						
	give demonstrations on product uses/purpose						
	help customers with special orders						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING						
	Ability to:						
	use suggestive selling						
	sell correct product for job						
	have confident selling manner						
	other: ______________________						
	______________________						
	MATHEMATICS						
	Ability to:						
	count money						
	figure markdowns						
	figure markups						
	figure employee discounts						
	handle refunds/exchanges						
	keep books						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MERCHANDISING						
	Ability to:						
	check market and keep up on in-coming fads/trends						
	stay in competition with competitors						
	prepare and take inventory checks and report results						
	stock sale merchandise						
	mark all merchandise						
	order according to demand						
	keep precision stock records						
	other: ____________________						
	____________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	operate cash register						
	-ring up cost of merchandise						
	-change tape						
	-use proper price and department						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	-record and report errors on cash register to head cashier on the proper form						
	-handle coupons and gift certificates						
	-handle refunds, rain checks, and credit sales						
	-use weights/measures						
	-use price charts						
	-work fast and accurately						
	keep counter area clean						
	restock counter items						
	get approval on necessary documents						
	keep bags stocked						
	attend store meetings						
	report thefts and pilferage						
	report faulty equipment or safety hazards						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	perform stocking functions						
	-restock items						
	-keep area clean and neat						
	-fill orders from stock						
	-request more stock						
	-lift and carry items						
	perform meatcutter functions						
	-prepare meat for sale						
	-cut, wrap, and price meat						
	-weigh meat						
	-cut meat to order						
	-know types and cuts of meat						
	-operate tools						
	perform bagger functions						
	-bag or box items						
	-carry out to vehicles						
	-return carts from parking lot						
	-clean work areas						
	-transport empty bottles to proper area						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				CN-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	perform produce and/or dairy functions						
	-weigh items and bag them						
	-date stock						
	-rotate stock according to date						
	-keep items chilled						
	-discount older merchandise						
	-learn produce techniques						
	-moisten produce						
	perform management functions						
	-prepare financial reports						
	-authorize checks						
	-use feedback received						
	-collect supervisor's reports						
	- hire and fire employees						
	-implement company policies						
	-plan, direct, and coordinate store operation						
	-work with employees						
	-work with other managers						
	-manage finances						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON THE - JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	perform food wholesaler functions						
	-service smaller stores						
	-help stores wtih advertising						
	-transport goods						
	-prepare assortments						
	-prepare food for shipping						
	other: ____________________						
	____________________						
	____________________						
	____________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	maintain familiarity with store layout to assist customers						
	have general product knowledge						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OTHER:						

04.06
12

FINAL EVALUATION FORM

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

Student ____________________
Training Station ____________________
Supervisor ____________________
Date ____________________

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

---

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

Traits which could be improved: ____________________

Ways in which student has improved: ____________________

Confidential remarks and additional comments:
(May be continued on reverse side)

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

Work Habits which could be improved: ____________________

Work Habits/Abilities which have improved: ____________________

Overall Evaluation:
____ excellent
____ above average
____ average
____ below average
____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

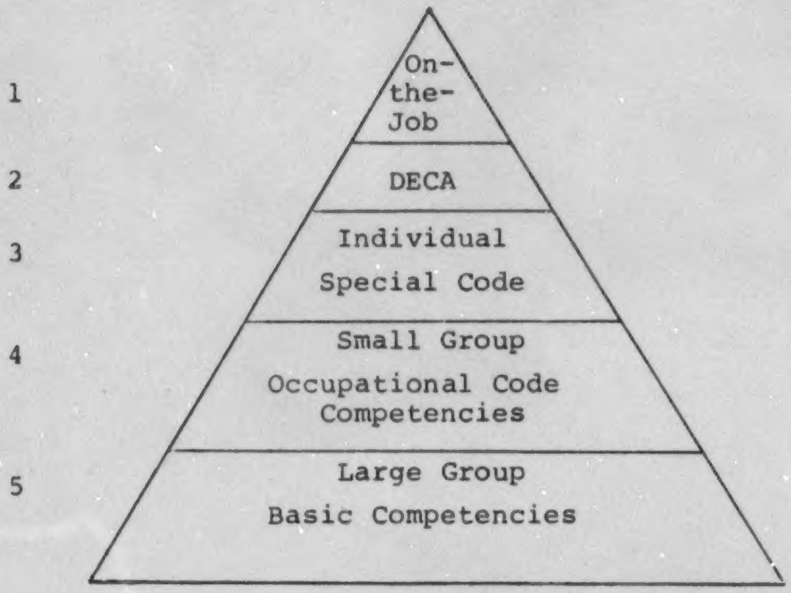
Food Services Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1: Individual competencies; some identified and some written in by employer or coordinator

Section 2: Competencies gained through DECA participation

Section 3: Competencies needed by this student only

Section 4: Competencies needed by a small group of students in the same occupational area (such as food service)

Section 5: Competencies needed by all students; general skills

DEFINITION OF TERMS:

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Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.07 Food Services Marketing

Student ______________________

Occupational Description:

Job Title ______________________

The occupations in this area are related to the various marketing functions and tasks performed by employees in establishments serving prepared food and beverages for consumption on their premises or for take-out consumption.

Sample job tasks and responsibilities:

ADVERTISING

make menu cards and signs
inform people of the daily special

COMMUNICATIONS

write legibly
answer telephone
speak well

DISPLAY

display food in an attractive way

HUMAN RELATIONS

deal with others well
display cordial manner
arrive on time
be able to work rapidly
have nice, clean appearance

SELLING

sell extra items at meals
suggest items to customers

MATHEMATICS

make change
handle charges/checks

MATHEMATICS (cont.)

process discounts:
  Canadian/Sr. Citizen/group
work with tax cards
add/subtract

MERCHANDISING

work with inventory:
  stocking
  rotation
  reordering

OPERATIONS AND MANAGEMENT

operate cash register:
  change tape
  handle overrings
  make change
service tables:
  clear
  clean
  re-set
wait on people:
  greet
  seat
  serve food/drinks
  keep beverage filled
present tab (bill):
  collect tab
  add up total

OPERATIONS AND MANAGEMENT (cont.)

maintain working area:
  fill items for tables
  keep area clean and neat
  keep tables clean and set
  clean seats
  wipe off bottled supplies
wash and clean:
  dishes, pots, and pans
  dinnerware
  mats and floors
empty garbage
change fryers when necessary
fill and clean ice cream, juice, milk, and other machines
open and close the store
change and fill drink machines (carbonated)
take reservations

PRODUCT AND SERVICE TECHNOLOGY

know temperature of items needing refrigeration or heat
know correct procedures for various operations

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	make menu cards and signs						
	inform people of the daily special						
	other: ________________						
	________________						
	COMMUNICATIONS						
	Ability to:						
	write legibly						
	answer telephone						
	speak well/clearly						
	other: ________________						
	________________						
	DISPLAY						
	Ability to:						
	display food in an attractive way						
	other: ________________						
	________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	 SMALL GROUP	 IND.	 DECA	ON-THE-JOB
	HUMAN RELATIONS						
	Ability to:						
	deal with others well						
	display cordial manner						
	arrive to work on time						
	work rapidly						
	have nice, clean appearance						
	other: ______________________						
	______________________						
	SELLING						
	Ability to:						
	sell extra items at meals						
	suggest items to customers						
	other: ______________________						
	______________________						
	MATHEMATICS						
	Ability to:						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	IN-CLASS SMALL GROUP	IN-CLASS IND.	IN-CLASS DECA	ON-THE-JOB
	MATHEMATICS (cont.)						
	make change						
	handle charge sales						
	handle sales by check						
	process discounts for Canadian currency, senior citizens, groups						
	work with tax cards						
	add and subtract						
	other:						
	MERCHANDISING						
	Ability to:						
	work with inventory						
	-stocking						
	-rotating stock						
	-reordering						
	other:						

			IN-CLASS				
Check if Applies	COMPETENCY	DATE COMP.	LARGE GROUP	SMALL GROUP	IND.	DECA	ON-THE-JOB
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	operate cash register						
	-change tape						
	-handle overrings						
	-make change						
	service tables						
	-clear table						
	-clean off table and chairs/seats						
	-re-set the table						
	wait on people						
	-greet them						
	-seat them						
	-serve food and drinks						
	-keep beverages filled						
	present the tab (bill)						
	-add up the total						
	-collect payment						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	maintain working area						
	-fill items for tables (such as salt, sugar, etc.)						
	-keep area clean and neat						
	-keep tables clean and set						
	-clean seats						
	-wipe off bottled supplies						
	wash and clean						
	-dishes, pots, and pans						
	-dinnerware						
	-mats and floors						
	empty garbage						
	change fryers when necessary						
	fill and clean ice cream, juice, milk, and other machines						
	open and close the store						
	change and fill drink machines (carbonated)						
	take reservations						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	 SMALL GROUP	 IND.	 DECA	ON-THE-JOB
	OPERATIONS AND MANAGEMENT (cont.)						
	other: ____________________						
	____________________						
	____________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know temperature of items needing refrigeration or heat						
	know correct procedures for various operations						
	demonstrate safe work habits						
	know correct temperatures for wash water						
	other: ____________________						
	____________________						
	OTHER:						
	____________________						
	____________________						
	____________________						
	____________________						

FINAL EVALUATION FORM

04.07

Student ______________________ 8
Training Station ______________________
Supervisor ______________________
Date ______________________

INSTRUCTIONS: Indicate the appropriate degree [illegible] satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10 9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10 9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10 9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10 9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10 9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10 9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10 9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10 9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ______________________

____

Traits which could be improved: ______________________

____

Ways in which student has improved: ______________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____
____
____
____
____
____

WORK HABITS/ABILITIES

Speed/Amount of Work	10 9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10 9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10 9	8	7	6	5	4	3	2	1	0	n/a
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Takes Suggestions	10 9	8	7	6	5	4	3	2	1	0	n/a
Selling	10 9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10 9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10 9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10 9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10 9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ______________________

____

Work Habits which could be improved: ______________________

____

Work Habits/Abilities which have improved: ______________________

____

Overall Evaluation:
____ excellent
____ above average
____ average
____ below average
____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

General Merchandise Retailing

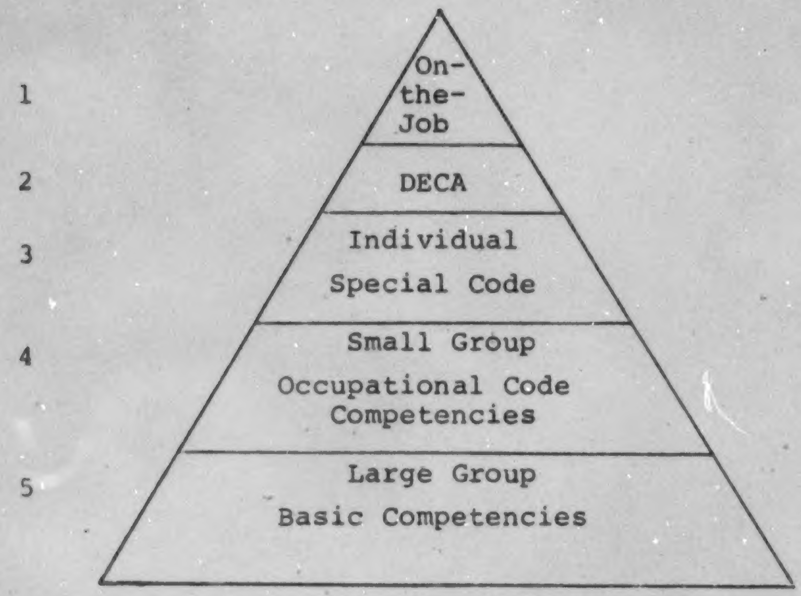
DISTRIBUTIVE EDUCATION CLUBS OF AMERICA

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



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Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.08 General Merchandise Retailing

Student ______________________________

Job Title ____________________________

Occupational Description:

Employees in this area perform marketing functions and tasks in typically large retail stores. These stores are engaged in merchandising a large number of lines of merchandise, such as department stores, variety, and general merchandise stores, and multi-line drug stores. Personnel are prepared to perform routine and complex tasks in relation to merchandising practices and concepts of mass merchandising rather than on in-depth knowledge of a single-line product or service.

Sample job tasks and responsibilities:

ADVERTISING

supply customer information on advertised items
promote advertised merchandise
display advertised merchandise

COMMUNICATION

answer telephone
inform buyers of customer wants
advise customers of current fashions/trends

DISPLAY

set up department displays
coordinate displays of advertised merchandise

HUMAN RELATIONS

refer customer problems to proper personnel
work well with others

HUMAN RELATIONS (cont.)

refer customer wants/special orders
supply customer with information by telephone

SELLING

learn sales cycle and techniques
use suggestive selling by suggesting related items or accessories

MATHEMATICS

use basic math skills
handle sales discounts
handle associate/employee sales
work with special sales/markdowns/percentages

MERCHANDISING

help with inventory counts
stock items
reorder items

OPERATIONS AND MANAGEMENT

make change
handle charge sales
handle layaway accounts
wrap and package
handle catalog orders
assist in training others
be aware of shoplifting problem
handle emergency situations

PRODUCT AND SERVICE TECHNOLOGY

have knowledge of merchandise (materials/types/brands/etc.)
know store policies
know store layout and item location

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	supply customer information on advertised items						
	promote advertised merchandise						
	display advertised merchandise						
	other: ______________________						
	______________________						
	COMMUNICATION						
	Ability to:						
	answer telephone						
	inform buyers of customer wants						
	advise customers of current fashions/ trends						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY						
	Ability to:						
	set up department displays						
	coordinate displays of advertised merchandise						
	other: ____________________						
	____________________						
	HUMAN RELATIONS						
	Ability to:						
	refer customer problems to proper personnel						
	work well with others						
	refer customer wants/special orders						
	supply customer with information by telephone or mail						
	other: ____________________						
	____________________						
	SELLING						
	Ability to:						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING (cont.)						
	learn sales cycle and technique						
	use suggestive selling by suggesting related items or accessories						
	other: ____________________						
	____________________						
	MATHEMATICS						
	Ability to:						
	use basic math skills						
	handle sales discounts						
	handle associate/employee sales						
	work with special sales						
	work with markdowns						
	figure percentages						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MERCHANDISING						
	Ability to:						
	help with inventory counts						
	stock items						
	reorder items						
	other: ________						
	________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	make change						
	handle charge sales						
	handle layaway accounts						
	wrap and package						
	handle catalog orders						
	assist in training others						
	be aware of shoplifting problem						
	handle emergency situations						
	other: ________						
	________						

04.08

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	have knowledge of merchandise (materials used, types, brands)						
	know store policies						
	know store layout and item location						
	other: ____________________						
	____________________						
	OTHER:						
	____________________						
	____________________						
	____________________						
	____________________						
	____________________						

FINAL EVALUATION FORM

04.08 7

Student ____________________

Training Station ____________________

Supervisor ____________________

Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average		average			below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

____

Traits which could be improved: ____________________

____

Ways in which student has improved: ____________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

____

Work Habits which could be improved: ____________________

____

Work Habits/Abilities which have improved: ____________________

____

Overall Evaluation:

- ____ excellent
- ____ above average
- ____ average
- ____ below average
- ____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

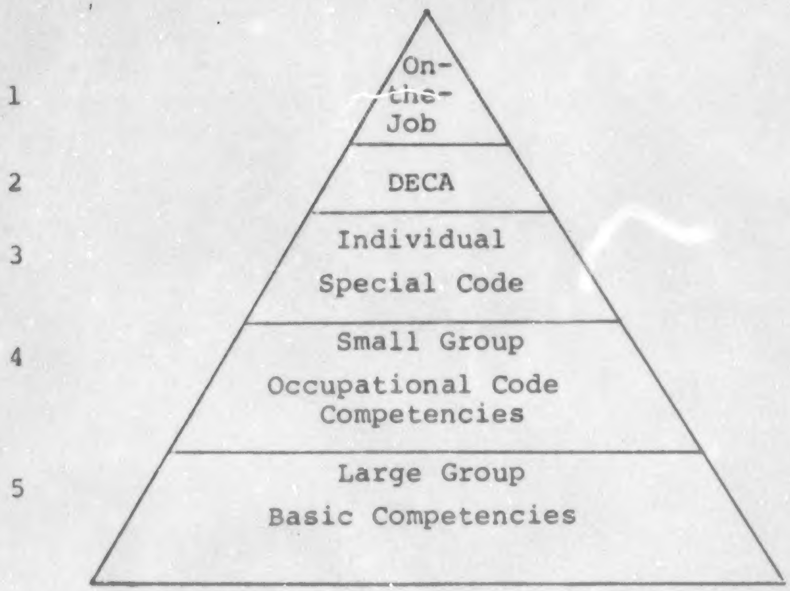
Hardware and Building Supplies Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1:	Individual competencies; some identified and some written in by employer or coordinator
Section 2:	Competencies gained through DECA participation
Section 3:	Competencies needed by this student only
Section 4:	Competencies needed by a small group of students in the same occupational area (such as food service)
Section 5:	Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, post-secondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.09 Hardware and Building Materials Marketing

Student ______________________

Job Title ______________________

Occupational Description:

This occupational area is concerned with the various marketing functions and tasks performed by employees in retail and wholesale establishments and in manufacturing firms. These firms deal primarily with one or more of the following product lines: hardware, paint, wallcoverings, lumber, building materials, glass, electrical supplies, plumbing, heating and air conditioning equipment and other materials, supplies, and equipment used by the general public and contractors.

Sample job tasks and responsibilities:

ADVERTISING

plan ads for promotions
know about cooperative funds

COMMUNICATIONS

refer customer's questions to proper personnel
help customer choose/decide

DISPLAY

set up in-store displays
dismantle in-store displays
maintain in-store displays

HUMAN RELATIONS

display competitive nature
display honesty and reliability
be of good health and nice appearance
get along with others

SELLING

create and fill desire to buy
close sale
pass savings to customer (i.e. sales, discounts)
use suggestive selling

MATHEMATICS

figure discounts and markdowns
use basic mathematics skills (addition, subtraction, multiplication, division)

MERCHANDISING

order merchandise
stock shelves with merchandise
keep merchandise clean and neat

OPERATIONS AND MANAGEMENT

use cash register (accept money, make change, process cash and charge slips, give receipts, etc.)

OPERATIONS AND MANAGEMENT (cont.)

read catalogs
recall present stock quantity
help with inventory counts
mark prices
look up prices and verify
measure and cut
weigh items
wrap gifts
use computer terminals and read output
keep sales area neat
stock cashier with bags and forms needed
be aware of problems of store security

PRODUCT AND SERVICE TECHNOLOGY

answer customer's questions about product (care, construction)
demonstrate use of products
show models and colors of products
recognize/identify merchandise (i.e. tools, types of paint, etc.)

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	plan ads for promotions						
	know about cooperative funds						
	other: ______________________						
	______________________						
	COMMUNICATIONS						
	Ability to:						
	refer customer's questions to proper personnel						
	help customer choose or decide on products						
	write legibly						
	speak clearly						
	other: ______________________						
	______________________						
	DISPLAY						
	Ability to:						
	set up in-store displays						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY (cont.)						
	dismantle in-store displays						
	maintain in-store displays						
	other: ____________________						
	____________________						
	HUMAN RELATIONS						
	Ability to:						
	display competitive nature						
	display honesty and reliability						
	be of good health and nice appearance						
	get along with others						
	other: ____________________						
	____________________						
	SELLING						
	Ability to:						
	create and fill desire to buy						
	close sale						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING (cont.)						
	pass savings to customer (in form of sales and dicounts)						
	use suggestive selling						
	other: ____________________						
	____________________						
	MATHEMATICS						
	Ability to:						
	figure discounts and markdowns						
	use basic mathematics skills						
	-addition						
	-subtraction						
	-multiplication						
	-division						
	other: ____________________						
	____________________						
	MERCHANDISING						
	Ability to:						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MERCHANDISING (cont.)						
	order merchandise						
	stock shelves with merchandise						
	keep merchandise clean and neat						
	other: ______________________						
	______________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	use cash register						
	-accept money						
	-make change						
	-process cash slips						
	-process charge slips						
	-give receipts						
	-change tape on machine						
	read catalogs						
	recall present stock quantity						
	help with inventory counts						
	mark prices						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	look up prices and verify						
	measure and cut						
	weigh items						
	wrap gifts						
	use computer terminals and read output						
	keep sales area neat						
	stock cashier with bags and forms						
	be aware of problems of store security						
	other: ______________________________						
	______________________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	answer customer's questions about product (care, construction)						
	demonstrate use of products correctly						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	PRODUCT AND SERVICE TECHNOLOGY (cont.)						
	show models and colors of products						
	recognize or identify merchandise carried (tools, types of paint, various building materials, etc.)						
	Other: ________________						
	________________						
	OTHER:						
	________________						
	________________						
	________________						
	________________						
	________________						

FINAL EVALUATION FORM

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

Student ______________________ 8

Training Station ______________________

Supervisor ______________________

Date ______________________

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

---

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ______________________

____

Traits which could be improved: ______________________

____

Ways in which student has improved: ______________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ______________________

____

Work Habits which could be improved: ______________________

____

Work Habits/Abilities which have improved: ______________________

____

Overall Evaluation:

____ excellent
____ above average
____ average
____ below average
____ poor

04.10

Distributive Education Training and Development Plan

SALES AND MARKETING

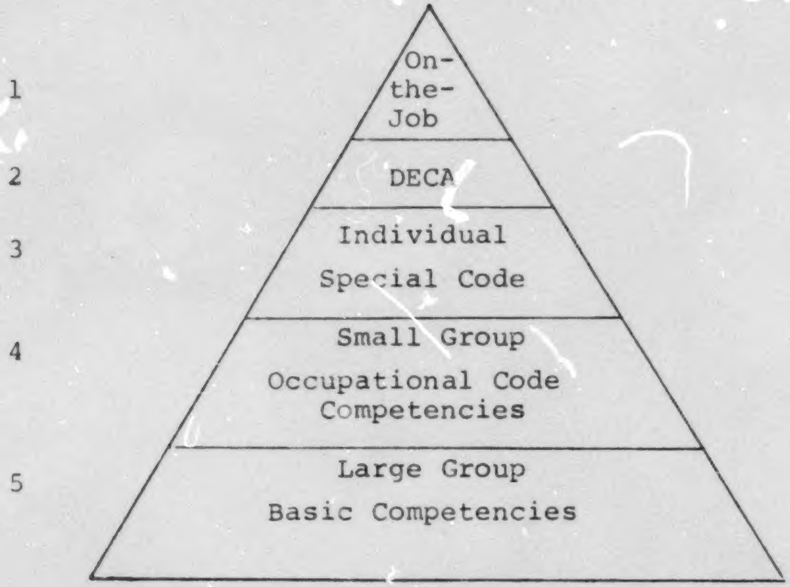
Home Furnishings Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1:	Individual competencies; some identified and some written in by employer or coordinator
Section 2:	Competencies gained through DECA participation
Section 3:	Competencies needed by this student only
Section 4:	Competencies needed by a small group of students in the same occupational area (such as food service)
Section 5:	Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, post-secondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.10 Home Furnishings Marketing

Student ______________________________

Occupational Description:

Job Title ______________________________

The home furnishings occupational area is concerned with the various marketing functions and tasks performed in retail, wholesale, and manufacturing establishments dealing with products primarily used for furnishing the home. These products may include: furniture, electrical and gas appliances, floor coverings, draperies, and other specialized lines such as lamps, chinaware, and antiques.

Sample job tasks and responsibilities:

ADVERTISING

prepare promotions
prepare advertisements
check advertisement copy

COMMUNICATIONS

handle customer complaints
deal with questions

DISPLAY

arrange displays
dismantle displays
maintain displays

HUMAN RELATIONS

exhibit outgoing and responsible personality
work well with others
be of assistance to others

SELLING

know selling cycle
know details of catalog orders
satisfy customer desires

MATHEMATICS

know basic math skills (addition, subtraction, multiplication, division)

MERCHANDISING

price items
know pricing policy
check stock quantities
reorder merchandise

OPERATIONS AND MANAGEMENT

help with store sales
handle discounts and coupons
know the peak seasons
know channels of distribution (manufacturer--wholesaler--jobber--retailer--agents)
know written store policy
know storage procedures
know pickup/delivery procedures
inventory control

OPERATIONS AND MANAGEMENT (cont.)

use cash register (make cash and charge sales, make change, process layaways and refunds)
know record keeping procedures
operate file systems
package
do heavy lifting
measure and cut properly
be aware of competitive influences

PRODUCT AND SERVICE TECHNOLOGY

know terminology and use it
seek product information
relate product information to customer
know care and construction details for items

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	prepare promotions						
	prepare advertisements						
	check advertisement copy						
	other: ______________________						
	______________________						
	COMMUNICATIONS						
	Ability to:						
	handle customer complaints						
	deal with questions						
	write legibly						
	speak clearly						
	other: ______________________						
	______________________						
	DISPLAY						
	Ability to:						
	arrange displays						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY (cont.)						
	dismantle displays						
	maintain displays						
	other: ________________						
	________________						
	HUMAN RELATIONS						
	Ability to:						
	exhibit outgoing and responsible personality						
	work well with others						
	be of service to others						
	other: ________________						
	________________						
	SELLING						
	Ability to:						
	know and use selling cycle						
	know details of catalog orders						
	satisfy customer desires						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING (cont.)						
	anticipate and answer objections						
	other: ____________________						
	____________________						
	MATHEMATICS						
	Ability to:						
	know basic math skills						
	-addition						
	-subtraction						
	-multiplication						
	-division						
	other: ____________________						
	____________________						
	MERCHANDISING						
	Ability to:						
	price items						
	know pricing policy						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MERCHANDISING (cont.)						
	check stock quantities						
	reorder merchandise						
	other: ____________________						
	____________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	help with store sales						
	handle coupon and discount sales						
	know the peak seasons for business						
	know channels of distribution (manufacturer--wholesaler--jobber--retailer--agents)						
	know which channels of distribution are utilized by business						
	know written store policy						
	know storage procedures						
	know pickup and delivery procedures						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	work with inventory control						
	use cash register						
	-make cash and charge sales						
	-make change						
	-process layaways						
	-process refunds						
	know record keeping procedures						
	operate file systems						
	package						
	do heavy lifting						
	measure and cut properly						
	be aware of competitive influence						
	other: ____________						
	____________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know terminology and use it correctly						
	seek product information						
	relate product information to customer						
	know care and construction details for items						
	other: ______________________________						
	______________________________						
	OTHER:						
	______________________________						
	______________________________						
	______________________________						
	______________________________						
	______________________________						

FINAL EVALUATION FORM

Student ____________________

Training Station ____________________

Supervisor ____________________

Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average		average		below average			poor		does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

____

Traits which could be improved: ____________________

____

Ways in which student has improved: ____________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

____

Work Habits which could be improved: ____________________

____

Work Habits/Abilities which have improved: ____________________

____

Overall Evaluation:
____ excellent
____ above average
____ average
____ below average
____ poor

04.11

Distributive Education Training and Development Plan

SALES AND MARKETING

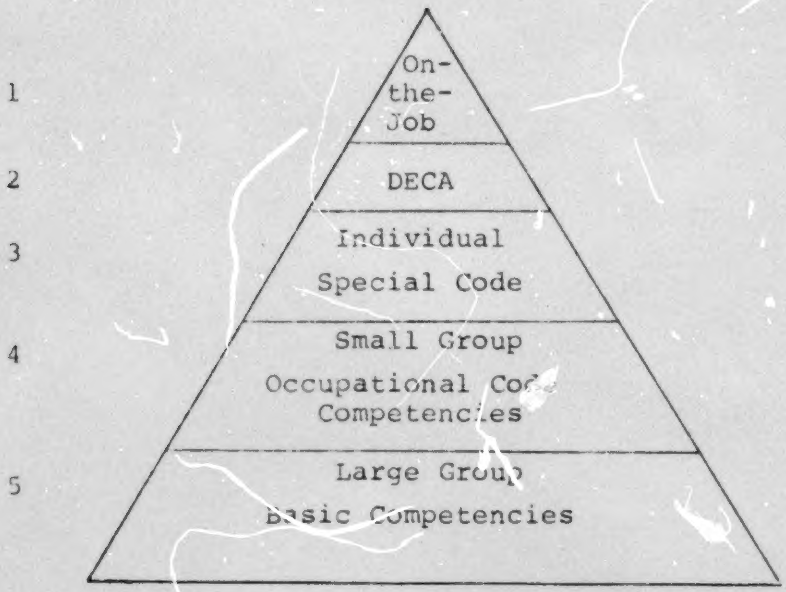
Hotel, Motel, and Lodging Services

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1:	Individual competencies; some identified and some written in by employer or coordinator
Section 2:	Competencies gained through DECA participation
Section 3:	Competencies needed by this student only
Section 4:	Competencies needed by a small group of students in the same occupational area (such as food service)
Section 5:	Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, post-secondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.11 Hotel, Motel, and Lodging Services

Student ____________________

Job Title ____________________

Occupational Description:

The tasks in this occupation relate to varied marketing functions. The employees and management engage in furnishing lodging, meals, convention facilities, and camping facilities on a year-round or seasonal basis to the general public or special groups.

Sample job tasks and responsibilities:

ADVERTISING

know layout procedures
know what to advertise to attract customers
know advertising media

COMMUNICATIONS

answer questions
handle emergency situations
use telephone properly
use written forms of communication (i.e. reservations)

DISPLAY

stock periodicals, candy, and cigarettes in eye-pleasing displays
straighten and maintain displays

HUMAN RELATIONS

maintain positive attitude
find alternative accommodations for people, if necessary
refer customer complaints to proper personnel
operate lost and found dept.
be able to accept criticism and suggestions

SELLING

handle banquet reservations
handle convention accommodations
suggest menus or accommodations
encourage use of restaurant facilities

MATHEMATICS

use basic business math
use basic math skills
be able to balance till

MERCHANDISING

inventory merchandise
reorder items as needed

OPERATIONS AND MANAGEMENT

operate 10 key adding machine
know various posting machines
assist in training employees
assist in hiring employees
decide which department to place an employee in
place customers in proper rooms according to number in party

PRODUCT AND SERVICE TECHNOLOGY

be familiar with laws governing type of business
be familiar with the offerings of the business

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	know layout procedures						
	know what to advertise to attract customers						
	know advertising media						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	answer questions						
	handle emergency situations						
	use telephone properly						
	use written forms of communication (reservations, etc.)						
	other: ____________________						
	____________________						
	DISPLAY						
	Ability to:						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY (cont.)						
	stock periodicals, candy, and cigarettes in eye-pleasing displays						
	straighten and maintain displays						
	other: ____________________						
	____________________						
	HUMAN RELATIONS						
	Ability to:						
	maintain positive attitude						
	find alternative accommodations for people, if necessary						
	refer customer complaints to proper personnel						
	operate lost and found department						
	be able to accept criticism and suggestions						
	work well with others						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING						
	Ability to:						
	handle banquet reservations						
	handle convention accommodations						
	suggest menus or accommodations						
	encourage use of restaurant or other facilities						
	other: ____________________						
	____________________						
	MATHEMATICS						
	Ability to:						
	use basic business math						
	use basic math skills						
	balance till						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MERCHANDISING						
	Ability to:						
	inventory merchandise						
	reorder items as needed						
	other: ______________________						
	______________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	operate 10-key adding machine						
	know various posting machines						
	assist in training employees						
	assist in hiring employees						
	decide which department to place an employee in						
	place customers in proper rooms according to number in party						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	be familiar with laws governing type of business						
	be familiar with the offerings of the business						
	other: ______________________________						
	______________________________						
	OTHER:						
	______________________________						
	______________________________						
	______________________________						
	______________________________						
	______________________________						

04.11

FINAL EVALUATION FORM

Student ____________________
Training Station ____________________
Supervisor ____________________
Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

Traits which could be improved: ____________________

Ways in which student has improved: ____________________

Confidential remarks and additional comments:
(May be continued on reverse side)

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

Work Habits which could be improved: ____________________

Work Habits/Abilities which have improved: ____________________

Overall Evaluation:
____ excellent
____ above average
____ average
____ below average
____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

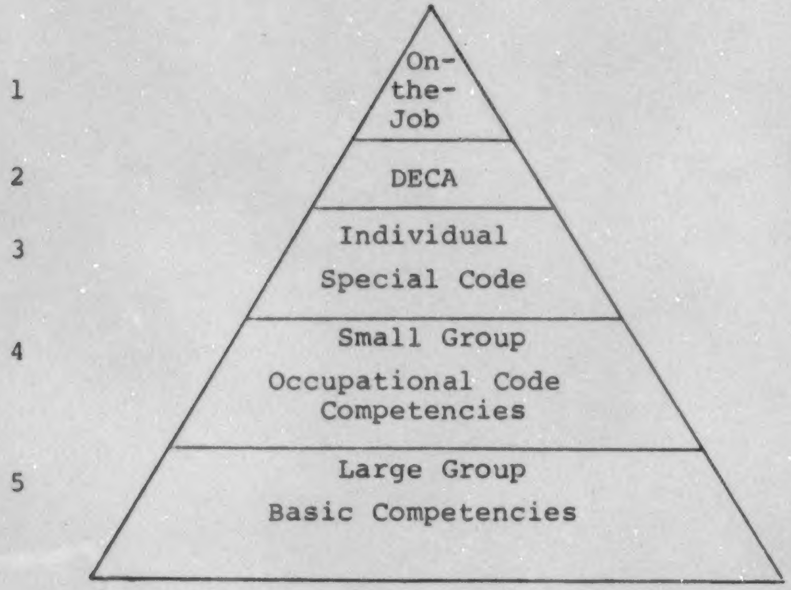
Industrial and Institutional Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1: Individual competencies; some identified and some written in by employer or coordinator

Section 2: Competencies gained through DECA participation

Section 3: Competencies needed by this student only

Section 4: Competencies needed by a small group of students in the same occupational area (such as food service)

Section 5: Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, post-secondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.12 Industrial and Institutional Marketing

Student________________________

Job Title________________________

Occupational Description:

Employees in industrial and institutional marketing work to establish market potentials for manufacturers for their industrial products. They may also market products of business, production industries, professional personnel and organizations, governmental agencies and institutions, and in purchasing such products and supplies by these various businesses and institutions.

Sample job tasks and responsibilities:

ADVERTISING

- know the basics of advertising
- prepare advertising copy
- decide what to advertise

COMMUNICATIONS

- negotiate effectively
- use telephone
- use written communications
- have degree of verbal ability

DISPLAY

- prepare displays
- maintain displays
- dismantle displays

HUMAN RELATIONS

- work with many types of people
- work well with others
- convey pleasant, helpful personality

SELLING

- know the selling cycle
- meet customer's needs
- interpret customer's needs and anticipate objections
- use suggestive selling
- close the sale

MATHEMATICS

- figure percentages
- use basic math skills (addition, subtraction, multiplication, division)

MERCHANDISING

- inventory stock on hand
- reorder stock
- maintain appearance of stock

OPERATIONS AND MANAGEMENT

- negotiate contracts
- operate 10-key adding machine
- supervise employee activities
- assist in training employees
- operate typewriter
- complete invoice extensions
- work with budget
- keep account and service records
- use product catalog
- draw up purchase orders
- draw up bids

PRODUCT AND SERVICE TECHNOLOGY

- know legal restrictions of business
- know information about the product or service being offered

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	know the basics of advertising						
	prepare advertising copy						
	decide what to advertise						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	negotiate effectively						
	use telephone						
	use written communications						
	have degree of verbal ability						
	other: ____________________						
	____________________						
	DISPLAY						
	Ability to:						
	prepare displays						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY (cont.)						
	maintain displays						
	dismantle displays						
	other: ______________________						
	______________________						
	HUMAN RELATIONS						
	Ability to:						
	work with many types of people						
	work well with others						
	convey pleasant, helpful personality						
	other: ______________________						
	______________________						
	SELLING						
	Ability to:						
	know the selling cycle						
	meet customer's needs						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING (cont.)						
	interpret customer's needs and anticipate objections						
	use suggestive selling						
	close the sale						
	other: ______________________						
	______________________						
	MATHEMATICS						
	Ability to:						
	figure percentages						
	use basic math skills (addition, subtraction, multiplication, division)						
	other: ______________________						
	______________________						
	MERCHANDISING						
	Ability to:						
	inventory stock on hand						
	reorder stock						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MERCHANDISING (cont.)						
	maintain appearance of stock						
	other: ______________________						
	______________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	negotiate contracts						
	operate 10-key adding machine						
	supervise employee activities						
	assist in training employees						
	operate typewriter						
	complete invoice extensions						
	work with budget						
	keep account and service records						
	use product catalog						
	draw up purchase orders						
	draw up bids						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know legal restrictions of business						
	know information about the product or service being offered						
	other: ______________________						
	______________________						
	OTHER:						
	______________________						
	______________________						
	______________________						
	______________________						
	______________________						

FINAL EVALUATION FORM

Student ______________________

Training Station ______________________

Supervisor ______________________

Date ______________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ______________________

____

Traits which could be improved: ______________________

____

Ways in which student has improved: ______________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ______________________

____

Work Habits which could be improved: ______________________

____

Work Habits/Abilities which have improved: ______________________

____

Overall Evaluation:
____ excellent
____ above average
____ average
____ below average
____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

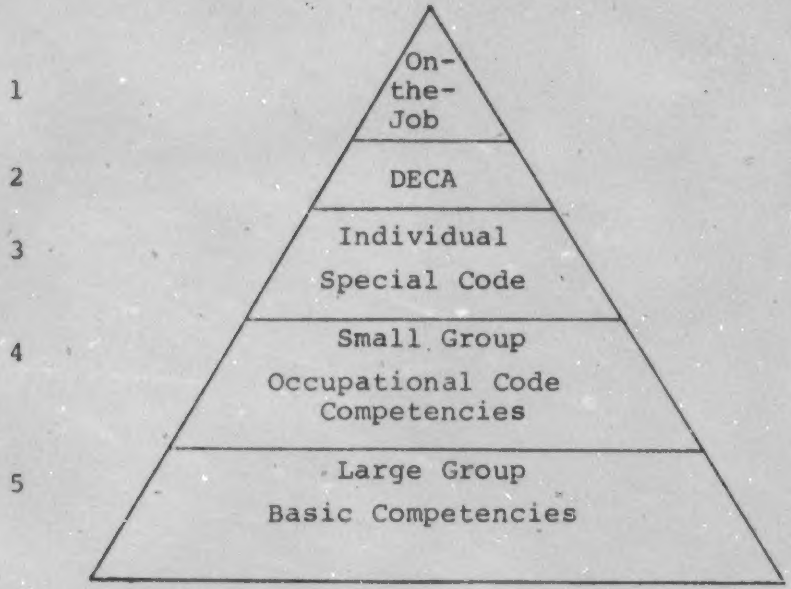
Insurance

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID


1
On-the-Job
2
DECA
3
Individual Special Code
4
Small Group Occupational Code Competencies
5
Large Group Basic Competencies

Section 1: Individual competencies; some identified and some written in by employer or coordinator

Section 2: Competencies gained through DECA participation

Section 3: Competencies needed by this student only

Section 4: Competencies needed by a small group of students in the same occupational area (such as food service)

Section 5: Competencies needed by all students; general skills

DEFINITION OF TERMS:

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Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.13 Insurance

Student ______________________

Occupational Description:

Job Title ______________________

The insurance salespeople are concerned with selling policies to individuals and businesses for protection against future losses and financial pressure. They analyze the client's needs and resources, then recommend a specific amount and type of insurance. Self-motivation and self-confidence are required plus verbal ability, patience, persistence, ability to work under pressure, and deal with people.

Sample job tasks and responsibilities:

ADVERTISING

know general background of advertising methods

COMMUNICATIONS

talk with and understand others
use the telephone
be persuasive in selling
have writing/typewriting skill

DISPLAY

know how to set up displays
have basic display knowledge

HUMAN RELATIONS

assure customer satisfaction
handle customer complaints
handle special policy problems
refer customer problems to proper personnel
refer customer wants
work with others well

SELLING

know selling cycle
know policy facts
know names of people
know record-keeping procedure
offer solutions
answer questions
negotiate agreements
recommend a specific type of policy and amount

MATHEMATICS

use basic skills (addition, subtraction, multiplication, division)

MERCHANDISING

keep record of policies and prices
keep ample stock of brochures and forms

OPERATIONS AND MANAGEMENT

work with discounts
work out transactions

OPERATIONS AND MANAGEMENT (cont.)

prepare insurance claims
collect premiums
answer questions and give product information
prepare contracts
prepare reports
plan work well
identify prospective customers

PRODUCT AND SERVICE TECHNOLOGY

know about various policies
know procedures for claims, selling policies, canceling policies
know information about company

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	know general background of advertising methods						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	talk with and understand others						
	use the telephone						
	be persuasive in selling						
	have writing/typewriting skill						
	other: ____________________						
	____________________						
	DISPLAY						
	Ability to:						
	know how to set up displays						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY (cont.)						
	have basic display knowledge						
	other: ____________________						
	____________________						
	HUMAN RELATIONS						
	Ability to:						
	assure customer satisfaction						
	handle customer complaints						
	handle special policy problems						
	refer customer complaints to proper personnel						
	refer customer wants						
	work with others well						
	other: ____________________						
	____________________						
	SELLING						
	Ability to:						
	know selling cycle						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING (cont.)						
	know policy facts						
	know names of people						
	know record-keeping procedure						
	offer solutions to problems						
	answer questions						
	negotiate agreements						
	recommend a specific type of policy						
	recommend a specific amount per policy						
	other: ______________________						
	______________________						
	MATHEMATICS						
	Ability to:						
	use basic skills						
	-addition						
	-subtraction						
	-multiplication						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MATHEMATICS (cont.)						
	-division						
	other: ____________________						
	____________________						
	MERCHANDISING						
	Ability to:						
	keep record of policies and prices						
	keep ample stock of brochures and forms						
	other: ____________________						
	____________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	work with discounts						
	work out transactions						
	prepare insurance claims						
	collect premiums						
	answer questions and give product information						

Check if Applies.	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	prepare contracts						
	prepare reports						
	plan work well						
	identify prospective customers						
	other: ______________________________						
	____________________________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know about various policies						
	know procedures for claims, selling policies, canceling policies						
	know information about company						
	other: ______________________________						
	____________________________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	 SMALL GROUP	 IND.	 DECA	ON-THE-JOB
	OTHER:						

FINAL EVALUATION FORM

Student ____________________

Training Station ____________________

Supervisor ____________________

Date ____________________

INSTRUCTIONS: Indicate the appropriate degree [illegible] satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
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Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

Traits which could be improved: ____________________

Ways in which student has improved: ____________________

Confidential remarks and additional comments:
(May be continued on reverse side)

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
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Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

Work Habits which could be improved: ____________________

Work Habits/Abilities which have improved: ____________________

Overall Evaluation:

____ excellent
____ above average
____ average
____ below average
____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

International Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
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Distributive Education
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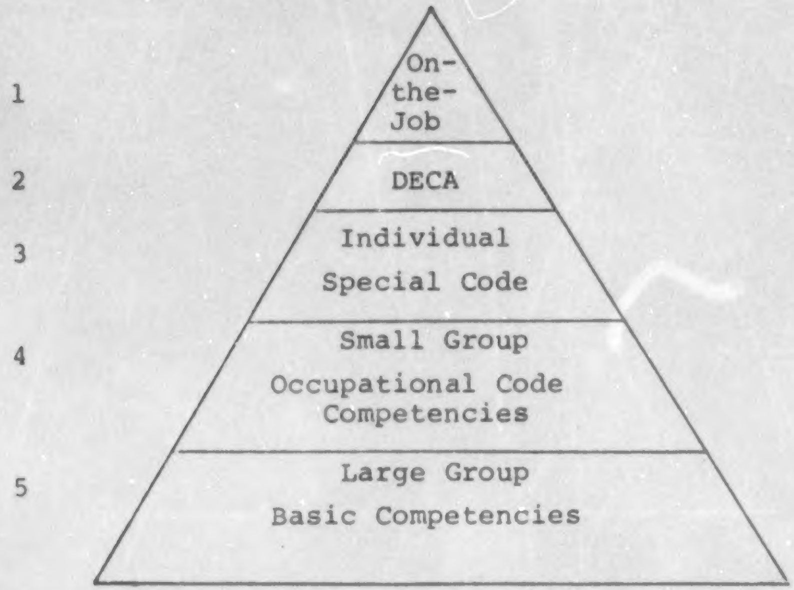
TRAINING PLAN PYRAMID



Section 1:	Individual competencies; some identified and some written in by employer or coordinator
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Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.14 International Marketing

Student________________________

Occupational Description:

Job Title________________________

Employees in international marketing are concerned with the marketing functions and tasks performed in various business and industrial establishments engaged partially or totally in export/import trade, and buying and selling in international markets. This includes elements of foreign trade which influence international marketing operations, such as trade controls, foreign operations, monetary problems, and foreign public relations.

Sample job tasks and responsibilities:

ADVERTISING

make signs for business
help with advertisements

COMMUNICATIONS

know foreign language
understand foreign customers (customs, beliefs, etc.)
use communication systems in other countries and own (telegram/telephone/mail)
transform product benefits into knowledge understood by different societies/people
have generally good skills in communicating with others

DISPLAY

set up displays
dismantle displays

HUMAN RELATIONS

get along with all customers and others

SELLING

promote imported items
point out selling features of items
know sales cycle and techniques of selling

MATHEMATICS

convert currencies
up-to-date knowledge of exchange rates
figure trade discounts
figure mark-ups
figure mark-downs

MERCHANDISING

fill in stock
make routine stock counts
reorder stock
convey orders to proper people
straighten stock and maintain looks of selling area
help with periodic inventory

OPERATIONS AND MANAGEMENT

know export/import terminology
know various transportation systems dealt with
know economic systems and monetary values for countries
know some foreign commercial law/work within legal framework of other countries
know international law
know some international finance (monetary, tax, etc.)
know geographical region being dealt with (helps understand resources/products/needs)
be able to fill out forms
arrange for shipment/delivery
know foreign and local taxes and bookkeeping procedures
wrap/package items
make change
handle various types of sales
handle layaways
handle bank card sales

PRODUCT AND SERVICE TECHNOLOGY

answer questions about products
know basic operations of business

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	make signs for business						
	help with advertisements						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	know foreign language						
	understand foreign customers (customs, beliefs, etc.)						
	use communication systems in other countries and own country (telegram, telephone, mail)						
	transform product benefits into knowledge understood by different societies and people						
	have generally good skills in communicating with others						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY						
	Ability to:						
	set up displays						
	dismantle displays						
	other: ____________						
	____________						
	HUMAN RELATIONS						
	Ability to:						
	get along with all customers and others						
	other: ____________						
	____________						
	SELLING						
	Ability to:						
	promote imported items						
	point out selling features of items						
	know sales cycle and techniques of selling						
	other: ____________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MATHEMATICS						
	Ability to:						
	convert currencies						
	have up-to-date knowledge of exchange rates						
	figure trade discounts						
	figure mark-ups						
	figure mark-downs						
	other: ______________________						
	______________________						
	MERCHANDISING						
	Ability to:						
	fill in stock						
	make routine stock counts						
	reorder stock						
	convey orders to proper people						
	straighten stock and maintain the appearance of selling area						

Check if Applies	COMPETENCY	DATE COMP.	IN CLASS			DECA	ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.		
	MERCHANDISING (cont.)						
	help with periodic inventory						
	other: ________________________						
	________________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	know export/import terminology						
	know various transportation systems dealt with						
	know economic systems and monetary values for countries						
	know some foreign commercial law						
	work within legal framework of other countries						
	know international law						
	know some international finance (monetary, tax, etc.)						
	know geographical region being dealt with (helps understand resources, products, and needs)						
	be able to fill out forms						
	arrange for shipment and delivery						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	know foreign and local taxes						
	know bookkeeping procedures						
	wrap and/or package items						
	make change						
	handle various types of sales						
	handle layaways						
	handle bank card sales						
	know various forms worked with						
	other: ____________						
	____________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	answer questions about products						
	know basic operation of business						
	other: ____________						
	____________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OTHER:						

04.14 8

FINAL EVALUATION FORM

Student ____________________

Training Station ____________________

Supervisor ____________________

Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

____

Traits which could be improved: ____________________

____

Ways in which student has improved: ____________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

____

Work Habits which could be improved: ____________________

____

Work Habits/Abilities which have improved: ____________________

____

Overall Evaluation:

____ excellent
____ above average
____ average
____ below average
____ poor

04.15

Distributive Education Training and Development Plan

SALES AND MARKETING

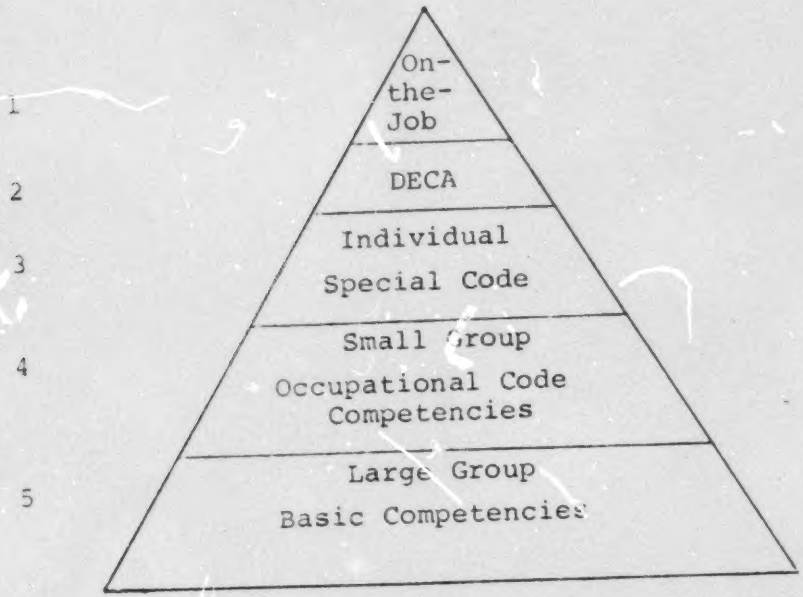
Personal Services Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1:	Individual competencies; some identified and some written in by employer or coordinator
Section 2:	Competencies gained through DECA participation
Section 3:	Competencies needed by this student only
Section 4:	Competencies needed by a small group of students in the same occupational area (such as food service)
Section 5:	Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, post-secondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.15 Personal Services Marketing

Student________________________

Occupational Description:

Job Title________________________

Personal services include consumer establishments such as shoe repair shops, funeral homes, laundries and dry cleaners, photographic studios, dance and art studios, barber/styling shops, beauty shops, gymnasiums, home maintenance and security firms, pet care shops, and protection agencies. Generally, these services are concerned with the well-being of the individual or the care of his/her property. Emphasis is on the marketing functions--not on the manual or technical skills required in a particular service/task which may require a special license.

Sample job tasks and responsibilities:

ADVERTISING

prepare signs
help with advertisements

COMMUNICATIONS

read reports, forms, and policies
listen to and understand directions, assignments, and information
use telephone correctly
write legibly
compose and complete basic correspondence
speak in public and private

DISPLAY

arrange displays to be used
dismantle displays

HUMAN RELATIONS

work with others
demonstrate pleasant personality and responsibility

SELLING

know the selling cycle
suggest items to fill customer needs/desires

MATHEMATICS

figure mark-ups
figure mark-downs
use basic math skills
figure sales tax (if no chart is available)

MERCHANDISING

stock merchandise
reorder merchandise
make periodic inventories
price items
keep merchandise areas attractive

OPERATIONS AND MANAGEMENT

know management structure
use cash register
handle various sales

OPERATIONS AND MANAGEMENT (cont.)

know how to evaluate employees
know worker's schedules
know organizational chart
know about distribution
know bookkeeping procedures
know payroll procedures
know terminology applicable
utilize printed sources of information
operate machines

PRODUCT AND SERVICE TECHNOLOGY

know product information
know business information
know policies and laws governing business

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	prepare signs						
	help with advertisements						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	read reports, forms and policies						
	listen to and understand directions, assignments, and information						
	use telephone correctly						
	write legibly						
	compose and complete basic correspondence						
	speak in public and private						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY						
	Ability to:						
	arrange displays to be used						
	dismantle displays						
	other: ____________________						
	____________________						
	HUMAN RELATIONS						
	Ability to:						
	work with others						
	demonstrate pleasant personality						
	demonstrate responsibility						
	other: ____________________						
	____________________						
	SELLING						
	Ability to:						
	know the selling cycle						
	suggest items to fill customer needs/desires						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING (cont.)						
	overcome objections						
	other: ____________________						
	____________________						
	MATHEMATICS						
	Ability to:						
	figure mark-ups						
	figure mark-downs						
	use basic math skills						
	figure tax (if no chart is available)						
	other: ____________________						
	____________________						
	MERCHANDISING						
	Ability to:						
	stock merchandise						
	rotate merchandise						
	reorder merchandise						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MERCHANDISING (cont.)						
	make periodic inventories						
	price items						
	keep merchandise areas attractive						
	other: ______________________						
	______________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	know management structure						
	use cash register						
	handle various types of sales						
	know how to evaluate employees						
	know worker's schedules						
	know organizational chart						
	know about distribution						
	know bookkeeping procedures						
	know payroll procedures						

			IN-CLASS				
Check if Applies	COMPETENCY	DATE COMP.	LARGE GROUP	SMALL GROUP	IND.	DECA	ON-THE-JOB
	OPERATIONS AND MANAGEMENT (cont.)						
	know terminology applicable						
	utilize printed sources of information						
	operate business machines						
	other: ____________________						
	____________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know product information						
	know business information						
	know policies and laws governing business						
	other: ____________________						
	____________________						
	OTHER						
	____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	IN-CLASS SMALL GROUP	IN-CLASS IND.	IN-CLASS DECA	ON-THE-JOB
	OTHER (cont.)						
	______________________________						
	______________________________						
	______________________________						
	______________________________						

04.15 8

FINAL EVALUATION FORM

Student ____________________

Training Station ____________________

Supervisor ____________________

Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

---

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

____

Traits which could be improved: ____________________

____

Ways in which student has improved: ____________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

____

Work Habits which could be improved: ____________________

____

Work Habits/Abilities which have improved: ____________________

____

Overall Evaluation:

____ excellent

____ above average

____ average

____ below average

____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

Petroleum Marketing

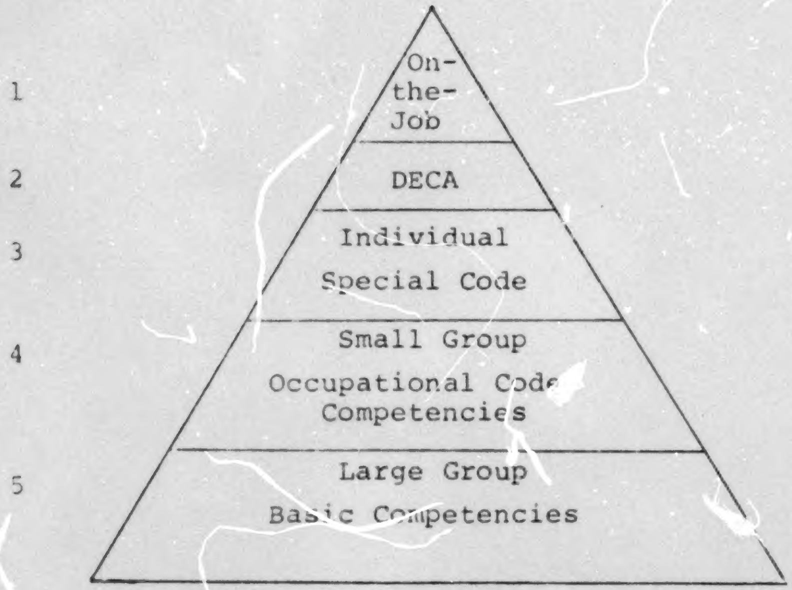
DISTRIBUTIVE EDUCATION CLUBS OF AMERICA

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1: Individual competencies; some identified and some written in by employer or coordinator

Section 2: Competencies gained through DECA participation

Section 3: Competencies needed by this student only

Section 4: Competencies needed by a small group of students in the same occupational area (such as food service)

Section 5: Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, post-secondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.16 Petroleum Marketing

Student______________________________

Occupational Description:

Job Title______________________________

Employees in the area of petroleum marketing perform marketing functions and tasks in retail and wholesale establishments engaged in the distribution of petroleum products.

Sample job tasks and responsibilities:

ADVERTISING

- produce layouts
- know what products and features to advertise

COMMUNICATIONS

- follow proper communication procedures
- use telephone

DISPLAY

- exhibit color coordination
- use proper display techniques
- set up displays
- dismantle displays
- maintain appearance of existing displays

HUMAN RELATIONS

- maintain good customer relations
- negotiate and communicate well with customers
- be willing to deal with the public
- refer customers to proper personnel

SELLING

- know sales cycle
- fill customer needs and desires
- suggest appropriate products
- suggest additional products
- handle special sales
- use correct billing procedure

MATHEMATICS

- use basic math skills
- use merchandising math skills
- figure mark-ups and mark-downs

MERCHANDISING

- stock merchandise
- take stock inventories
- reorder stock

OPERATIONS AND MANAGEMENT

- operate cash register
- make change
- handle charge sales (charge cards and accounts)
- make refunds

OPERATIONS AND MANAGEMENT (cont.)

- handle sales discounts
- handle employee sales
- know basic business operations
- help with training employees

PRODUCT AND SERVICE TECHNOLOGY

- know products carried
- know purposes of each product
- know background information on items using each product (i.e. know about oil furnaces, automobiles, etc.)
- know services offered

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	produce layouts						
	know what products and features to advertise						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	follow proper communication procedures						
	use telephone correctly						
	other: ____________________						
	____________________						
	DISPLAY						
	Ability to:						
	exhibit color coordination						
	use proper display techniques						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	 SMALL GROUP	 IND.	 DECA	ON-THE-JOB
	DISPLAY (cont.)						
	set up displays						
	dismantle displays						
	maintain appearance of existing displays						
	other: ______________________						
	______________________						
	HUMAN RELATIONS						
	Ability to:						
	maintain good customer relations						
	negotiate and communicate well with customers						
	be willing to deal with the public						
	refer customers to proper personnel						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING						
	Ability to:						
	know sales cycle						
	fill customer needs and desires						
	suggest appropriate products						
	suggest additional products						
	handle special sales						
	use correct billing procedures						
	other: ____________________						
	____________________						
	MATHEMATICS						
	Ability to:						
	use basic math skills						
	use merchandising math skills						
	figure mark-ups and mark-downs						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MERCHANDISING						
	Ability to:						
	stock merchandise						
	take stock inventories						
	reorder stock						
	other: ______________________						
	______________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	operate cash register						
	make change						
	handle charge sales (charge cards and accounts)						
	make refunds						
	handle sales discounts						
	handle employee sales						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	know basic business operations						
	help with training employees						
	other: ____						
	____						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know products carried						
	know purposes of each product						
	know background information on items that use each product (such as oil furnaces, automobiles, etc.)						
	know services offered						
	other: ____						
	____						
	OTHER						
	____						
	____						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	IN-CLASS SMALL GROUP	IN-CLASS IND.	IN-CLASS DECA	ON-THE-JOB
	OTHER (cont.)						
	______________________						
	______________________						
	______________________						
	______________________						

FINAL EVALUATION FORM

Student____________________
Training Station________________
Supervisor____________________
Date______________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong:____________________

Traits which could be improved:________________

Ways in which student has improved:____________

Confidential remarks and additional comments:
(May be continued on reverse side)

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong:________________

Work Habits which could be improved:____________

Work Habits/Abilities which have improved:________

Overall Evaluation:
____ excellent
____ above average
____ average
____ below average
____ poor

04.1

Distributive Education Training and Development Plan

SALES AND MARKETING

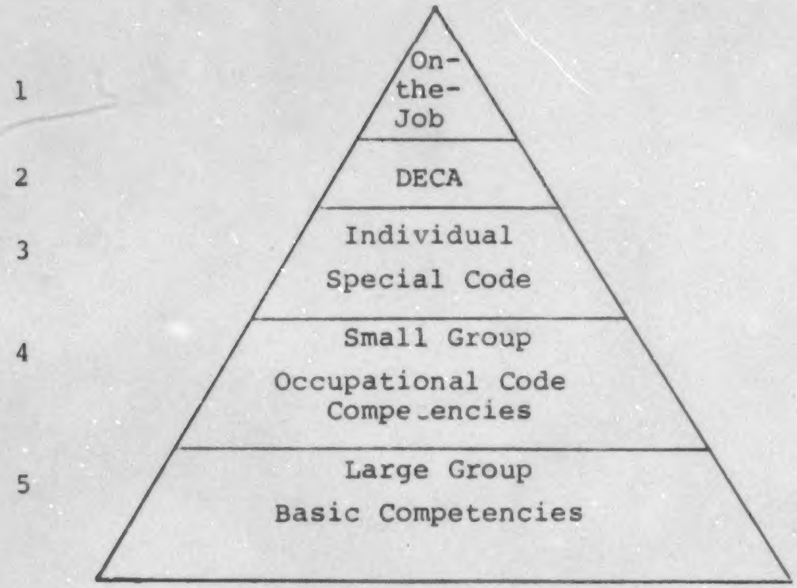
Real Estate Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1: Individual competencies; some identified and some written in by employer or coordinator

Section 2: Competencies gained through DECA participation

Section 3: Competencies needed by this student only

Section 4: Competencies needed by a small group of students in the same occupational area (such as food service)

Section 5: Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, postsecondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.17 Real Estate Marketing

Student ______________________________

Occupational Description:

Job Title ____________________________

People performing jobs in the real estate marketing area act for themselves or as agents for others in real estate brokerages or other firms. These firms are engaged in buying, selling, appraising, renting, managing, and leasing property.

ADVERTISING

prepare layouts
decide which real estate to be advertised

COMMUNICATIONS

talk with and listen to others
use the telephone
have writing and typewriting skills
use real estate terms

DISPLAY

display houses/real estate on a rack
keep displays maintained

HUMAN RELATIONS

work with others
have basic understanding of people's motivations
negotiate with customers
work with both buyers and sellers of real estate

SELLING

know basic selling principles
be aware of selling cycle
meet needs of people
suggest real estate that might be appropriate

MATHEMATICS

work with interest rate tables
figure down payments
figure percentages
figure monthly payments
figure taxes and insurance

MERCHANDISING

maintain sufficient number of real estate items to be sold
be constantly informed as to what is and is not available for sale

OPERATIONS AND MANAGEMENT

meet qualifications:
pass Washington State License Examination (which includes)
-practical application principles
-requirements set by Real Estate Commission of the state
-Class: Appraisal
Finance
Zoning
Definitions and law

OPERATIONS AND MANAGEMENT (cont.)

complete appraisals
know industry goals
know means of financing (FHA, Conventional, FHA-VA, VA)
be aware of market values
know quality of various homes
write up contracts
perform bookkeeping and/or accounting functions
use basic business vocabulary
be aware of expanding area
follow code of ethics

PRODUCT AND SERVICE TECHNOLOGY

know what is available from firm
know laws governing sales of real estate
know laws governing contracts
know rules and regulations of lending institutions
know zoning regulations

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	prepare layouts						
	decide which real estate to be advertised						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	talk with and listen to people						
	use the telephone						
	have writing and typewriting skills						
	use real estate terms						
	other: ____________________						
	____________________						
	DISPLAY						
	Ability to:						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY (cont.)						
	display houses and real estate on rack or board						
	keep displays maintained and up-to-date						
	other: ________________						
	________________						
	HUMAN RELATIONS						
	Ability to:						
	work with others						
	have basic understanding of people's motivations regarding real estate						
	negotiate with customers						
	work with both buyers and sellers of real estate						
	other: ________________						
	________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	 SMALL GROUP	 IND.	 DECA	ON-THE-JOB
	SELLING						
	Ability to:						
	know basic selling principles						
	be aware of selling cycle						
	meet needs of people						
	suggest real estate that might be appropriate						
	other: ______________________						
	______________________						
	MATHEMATICS						
	Ability to:						
	work with interest rate tables						
	figure down payments						
	figure percentages						
	figure monthly payments						
	figure taxes and insurance						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	IN-CLASS SMALL GROUP	IN-CLASS IND.	IN-CLASS DECA	ON-THE-JOB
	MERCHANDISING						
	Ability to:						
	maintain sufficient number of real estate items to be sold						
	be constantly informed as to what is and what is not available for sale						
	other: ______________________________ ______________________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	meet qualifications for license						
	pass Washington State License Examination, which includes:						
	-practical application principles						
	-requirements set by Real Estate Commission of the state						
	-class on appraisal						
	-class on finance						
	-class on zoning						
	-class on definitions and law						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	complete appraisals						
	know industry goals						
	know means of financing (FHA, Conventional, FHA/VA, and VA)						
	be aware of market values						
	know quality of various homes						
	write up contracts						
	perform bookkeeping and/or accounting functions						
	use basic business vocabulary						
	be aware of expanding areas						
	follow code of ethics						
	other: ______________________________						
	______________________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know what is available from firm						
	know laws governing sales of real estate						

Check i Applie	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	SMALL GROUP	IND.	DECA	ON-THE-JOB
	PRODUCT AND SERVICE TECHNOLOGY (cont.)						
	know laws governing contracts						
	know rules and regulations of lending institutions						
	know zoning regulations						
	other: ____________________						
	____________________						
	OTHER						
	____________________						
	____________________						
	____________________						
	____________________						
	____________________						

FINAL EVALUATION FORM

Student ____________________
Training Station ____________________
Supervisor ____________________
Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

____

Traits which could be improved: ____________________

____

Ways in which student has improved: ____________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

____

Work Habits which could be improved: ____________________

____

Work Habits/Abilities which have improved: ____________________

____

Overall Evaluation:
____ excellent
____ above average
____ average
____ below average
____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

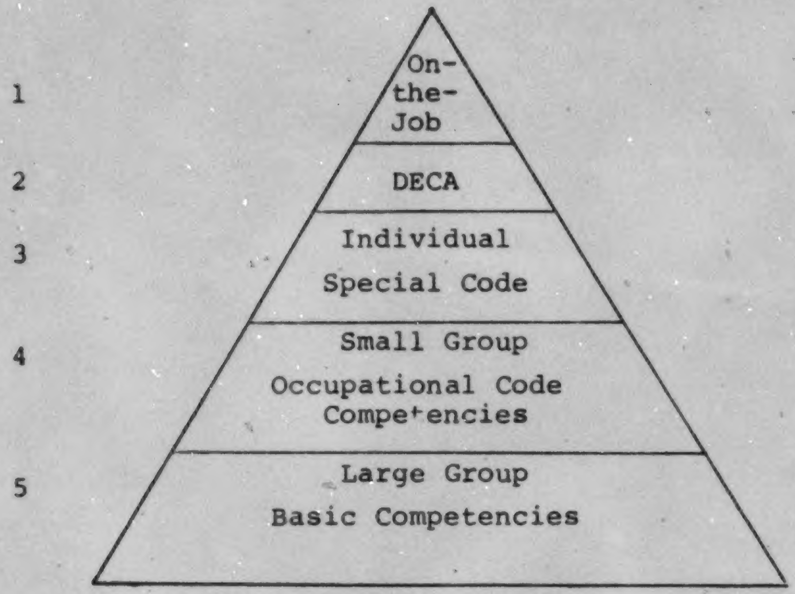
Recreational Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1:	Individual competencies; some identified and some written in by employer or coordinator
Section 2:	Competencies gained through DECA participation
Section 3:	Competencies needed by this student only
Section 4:	Competencies needed by a small group of students in the same occupational area (such as food service)
Section 5:	Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, postsecondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.18 Recreational Marketing

Student____________________________

Occupational Description:

Job Title__________________________

Employees in recreation marketing work in establishments engaged in providing amusement, recreation, entertainment, sporting or sightseeing services on a payment of a fee or admission charge. This includes sporting and recreational facilities other than resort accommodations or in retail or wholesale establishments marketing recreational supplies and equipment such as sporting goods.

Sample job tasks and responsibilities:

ADVERTISING

- advertise information about tours, facilities, etc.
- help prepare advertisements

COMMUNICATIONS

- prepare overdue payment notices
- prepare letters
- use telephone

DISPLAY

- use enticing tour pictures in good display
- display advertisements where prospects will see them

HUMAN RELATIONS

- work well with customers and other employees
- be cooperative and have patience
- display a pleasing personality
- handle complaints and problems

HUMAN RELATIONS (cont.)

- be accurate and efficient
- communicate clearly
- handle large groups and keep control at all times
- have a good memory for names and places
- listen to people and understand their needs/desires
- answer questions

SELLING

- use selling principles
- understand sales cycle
- answer customer questions
- fit service to customer's desires
- sell additional merchandise
- emphasize group rates for tours (to sell more)

MATHEMATICS

- use basic math skills
- have good numerical ability
- understand odds for amusement park or carnival

MERCHANDISING

- stock appropriate items
- reorder merchandise
- maintain merchandise area

OPERATIONS AND MANAGEMENT

- use good vocabulary
- work indoors or outdoors
- understand operation and policies
- know what people want from business
- know different types of payments
- use cash register
- make change
- handle charges
- handle checks
- work with various types of scoring (i.e. golf, tennis)

PRODUCT AND SERVICE TECHNOLOGY

- know product/service offered
- know regulations applied to product/service
- know when different sports are in season

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	IN-CLASS SMALL GROUP	IN-CLASS IND.	IN-CLASS DECA	ON-THE-JOB
	ADVERTISING						
	Ability to:						
	advertise information about tours, facilities, etc.						
	help prepare advertisements						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	prepare overdue payment notices						
	prepare letters						
	use telephone correctly						
	other: ____________________						
	____________________						
	DISPLAY						
	Ability to:						
	use enticing tour pictures in good display						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY (cont.)						
	Ability to:						
	display advertisements where prospects will see them						
	other: ______________________________						
	______________________________						
	HUMAN RELATIONS						
	Ability to:						
	work well with customers						
	work well with other employees						
	be cooperative and patient						
	display a pleasing personality						
	handle complaints and problems						
	be accurate and efficient						
	communicate clearly						
	handle large groups and maintain control at all times						
	have good memory of names and places						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	HUMAN RELATIONS (cont.)						
	listen to people and understand their needs/desires						
	answer questions						
	other: ____________________						
	____________________						
	SELLING						
	Ability to:						
	use selling principles						
	understand sales cycle						
	answer customer's questions						
	fit services to customer's desires						
	sell additional merchandise						
	emphasize group rates for tours (to sell more)						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MATHEMATICS						
	Ability to:						
	use basic math skills						
	have good numerical ability						
	understand odds for amusement park or carnival						
	other:______________________						
	____________________________						
	MERCHANDISING						
	Ability to:						
	stock appropriate items						
	reorder merchandise						
	maintain merchandise area						
	other:______________________						
	____________________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	use good vocabulary						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	work indoors or outdoors						
	understand operation and policies						
	know what people want from business						
	know different types of payments						
	use cash register						
	make change						
	handle charge sales						
	handle checks						
	work with various types of scoring (tennis, golf, etc.)						
	other:____________________						
	__________________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know product or service offered						
	know regulations applied to product or service						

			IN-CLASS				
Check if Applies	COMPETENCY	DATE COMP.	LARGE GROUP	SMALL GROUP	IND.	DECA	ON-THE-JOB
	PRODUCT AND SERVICE TECHNOLOGY (cont.)						
	know when different sports are in season						
	other: ____________________						
	____________________						
	OTHER						
	____________________						
	____________________						
	____________________						
	____________________						
	____________________						

FINAL EVALUATION FORM

Student ____________________

Training Station ____________________

Supervisor ____________________

Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS												
Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

____

Traits which could be improved: ____________________

____

Ways in which student has improved: ____________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

WORK HABITS/ABILITIES												
Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
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Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

____

Work Habits which could be improved: ____________________

____

Work Habits/Abilities which have improved: ____________________

____

Overall Evaluation:

____ excellent
____ above average
____ average
____ below average
____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

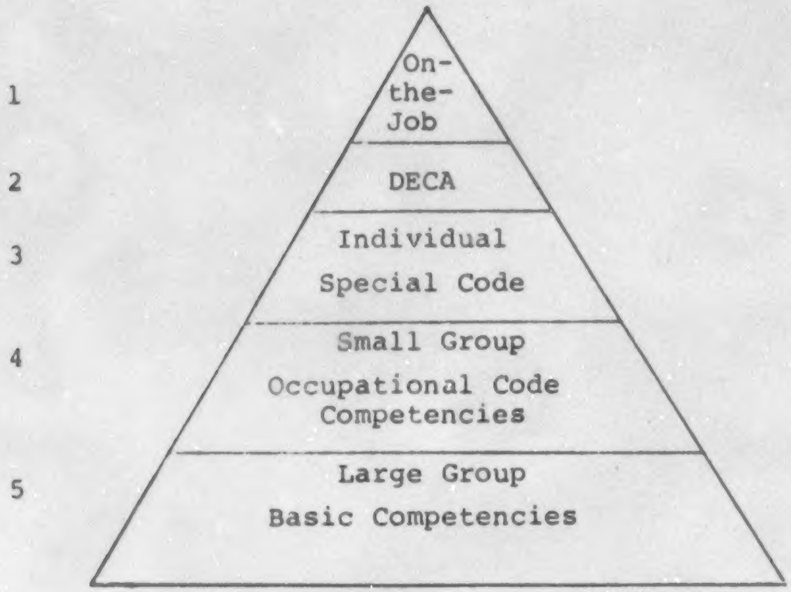
Transportation and Travel Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



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Occupational Code: One of 20 areas (such as finance advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.19 Transportation and Travel Marketing

Student ______________________________

Job Title ____________________________

Occupational Description:

Employees in this occupational area work with physical movement of people, personal effects, and freight. These people may work in freight transportation, passenger transportation, tourism, travel services, and warehouses.

Sample job tasks and responsibilities:

ADVERTISING

- prepare advertisements
- be aware of advertising media
- inform employees of advertisements

COMMUNICATIONS

- understand other's language
- answer/place phone calls
- convey information to others accurately
- use codes (Morse, etc.)

DISPLAY

- display brochures and other items nicely

HUMAN RELATIONS

- work closely with others
- help make trip pleasant for infirm/children
- work with custom's officials

SELLING

- stress benefits of employing company to prospects
- sell tours or travel arrangements
- know sales cycle
- be interested in customer wants and needs
- respond to customer questions

MATHEMATICS

- use basic math skills
- figure costs of trips
- figure costs of freight transportation
- figure costs of storage
- compute ticket prices

MERCHANDISING

- check supplies
- obtain more supplies
- keep supplies organized and available

OPERATIONS AND MANAGEMENT

- arrange for freight storage
- reserve space for freight
- use computer terminals
- supervise freight loading/unloading
- distribute weight of freight
- trace shipments
- pick up and deliver freight
- record shipments in log
- collect bills and adjust claims
- keep accurate records
- maintain vehicle (plane, train, etc.)
- clean vehicle
- supervise crew members
- communicate with home base
- plan fuel, route, speed
- perform pre-departure tasks
- use travel schedules
- use timetables/ratebooks/travel manuals/published information
- plan itinerary arrangements
- verify arrival and departure
- fill out ticket forms
- check and weigh baggage

PRODUCT AND SERVICE TECHNOLOGY

- know changes in schedule
- know regulations of governing agencies

			IN-CLASS				
Check if Applies	COMPETENCY	DATE COMP.	LARGE GROUP	SMALL GROUP	IND.	DECA	ON-THE-JOB
	ADVERTISING						
	Ability to:						
	prepare advertisements						
	be aware of advertising media						
	inform employees of advertisements						
	other: ______________________						
	______________________						
	COMMUNICATIONS						
	Ability to:						
	understand other's language						
	answer and place telephone calls						
	convey information to others accurately						
	use codes (Morse, etc.)						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY						
	Ability to:						
	display brochures and other items nicely						
	other: ____________________						
	____________________						
	HUMAN RELATIONS						
	Ability to:						
	work closely with others						
	help make trip pleasant for infirm people, children, and others						
	work with custom's officials						
	other: ____________________						
	____________________						
	SELLING						
	Ability to:						
	stress benefits of employing company to prospects						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING (cont.)						
	sell tours or travel arrangements						
	know sales cycle						
	be interested in customer wants and needs						
	respond to customer questions						
	other: ______________________						
	______________________________						
	MATHEMATICS						
	Ability to:						
	use basic math skills						
	figure costs of trips						
	figure costs of freight transportation						
	figure costs of storage						
	compute ticket prices						
	other: ______________________						
	______________________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MERCHANDISING						
	Ability to:						
	check supplies						
	obtain more supplies						
	keep supplies organized and available						
	other: ____________________						
	____________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	arrange for freight storage						
	reserve space for freight						
	use computer terminals						
	supervise freight loading and unloading						
	distribute weight of freight						
	trace shipments						
	pick up and deliver freight						
	record shipments in log						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	collect bills and adjust claims						
	keep accurate records						
	maintain vehicle (plane, train, etc.)						
	clean vehicle						
	supervise crew members						
	communicate with home base						
	plan fuel, route, speed						
	perform pre-departure tasks						
	use travel schedules						
	use timetables						
	use ratebooks						
	use travel manuals						
	use other published information						
	plan itinerary arrangements						
	verify arrival and departure						
	fill out ticket forms						

			IN-CLASS				
Check if Applies	COMPETENCY	DATE COMP.	LARGE GROUP	SMALL GROUP	IND.	DECA	ON-THE-JOB
	OPERATIONS AND MANAGEMENT (cont.)						
	check and weigh baggage						
	other: ____________________						
	____________________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know changes in schedule or services						
	know regulations governing agencies						
	other: ____________________						
	____________________						
	OTHER						
	____________________						
	____________________						
	____________________						
	____________________						
	____________________						

FINAL EVALUATION FORM

Student ____________________
Training Station ____________________
Supervisor ____________________
Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

---

TRAITS												
Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

____

Traits which could be improved: ____________________

____

Ways in which student has improved: ____________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____
____
____
____
____
____

WORK HABITS/ABILITIES												
Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

____

Work Habits which could be improved: ____________________

____

Work Habits/Abilities which have improved: ____________________

____

Overall Evaluation:
___ excellent
___ above average
___ average
___ below average
___ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

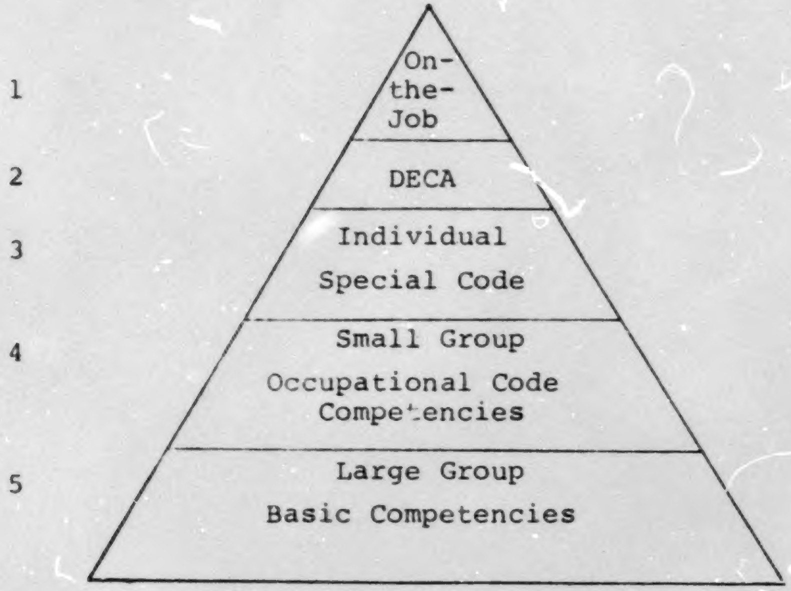
Business Services Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1: Individual competencies; some identified and some written in by employer or coordinator

Section 2: Competencies gained through DECA participation

Section 3: Competencies needed by this student only

Section 4: Competencies needed by a small group of students in the same occupational area (such as food service)

Section 5: Competencies needed by all students; general skills

DEFINITION OF TERMS:

Competency: A competency is an identified ability or skill. For instance, the ability to make change is a competency.

Distributive Education: Distributive Education is a program offered at secondary, post-secondary, and adult levels. Our secondary program is geared toward preparing students for careers in marketing and distribution through on-the-job training and related in-class training in their occupational area.

Occupational Code: One of 20 areas (such as finance, advertising and display, or insurance) in the area of Marketing and Distribution identified by the U. S. Office of Education as relating to Distributive Education.

Occupational Description: The description is adapted from the U. S. Office of Education code book.

Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4 20 Business Services Marketing

Student______________________________

Job Title____________________________

Occupational Description:

Employees in business services marketing work in firms engaged primarily in providing services, not elsewhere classified, to business establishments on a fee or contract basis. This may include sales, buying, marketing research, management and consulting services, protective services, public relations, financial services, building maintenance, employment services, and equipment rental and leasing.

Sample job tasks and responsibilities:

ADVERTISING

use advertising to promote the business
help with advertising development

COMMUNICATIONS

use telephone and writing in communicating
listen well

DISPLAY

display examples of previous work

HUMAN RELATIONS

work well with others
meet public
approach strangers to gather necessary information
explain convincingly
use initiative, tact, and patience dealing with people
understand and deal with customer complaints
handle difficult and delicate situations

HUMAN RELATIONS (cont.)

display stamina and ability
work indoors or outdoors
concentrate and conceptualize

SELLING

know sales cycle
satisfy customer's desires
meet questions with satisfactory answers
prepare necessary contracts
suggest additional services

MATHEMATICS

use basic math skills
use numerical abilities
understand, tabulate, and relate statistical information to client

MERCHANDISING

manage inventory
stock inventory
reorder inventory

OPERATIONS AND MANAGEMENT

match people's abilities to appropriate jobs
understand related principles of management/marketing
organize work
understand insurance and other policies affecting business
understand store and company policies (i.e. dress code)
recognize needs of customers and change with needs
make trips on business (i.e. buying trips)
understand general business management principles
know different types of payments
know importance of groups
use general accounting principles
make out fee cards and contracts
handle charges, checks, and cash sales
use cash register
prepare checks

PRODUCT AND SERVICE TECHNOLOGY

know care of equipment (i.e. rental or own equipment)
know services offered

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	use advertising to promote the business						
	help with advertising development						
	other: ____________________						
	____________________						
	COMMUNICATIONS						
	Ability to:						
	use telephone and writing in communicating						
	listen well						
	other: ____________________						
	____________________						
	DISPLAY						
	Ability to:						

			IN-CLASS				
Check if Applies	COMPETENCY	DATE COMP.	LARGE GROUP	SMALL GROUP	IND.	DECA	ON-THE-JOB
	DISPLAY (cont.)						
	display examples of previous work						
	other: ______________________________						
	______________________________						
	HUMAN RELATIONS						
	Ability to:						
	work well with others						
	meet the public						
	approach strangers to gather necessary information						
	explain convincingly						
	use initiative, tact, and patience in dealing with others						
	understand and deal with customer complaints						
	handle difficult and delicate situations						
	display stamina and ability						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	HUMAN RELATIONS (cont.)						
	work indoors or outdoors						
	concentrate and conceptualize						
	other: ______________________						
	______________________						
	SELLING						
	Ability to:						
	know sales cycle						
	satisfy customer's desires						
	meet questions with satisfactory answers						
	prepare necessary contracts						
	suggest additional services						
	other: ______________________						
	______________________						
	MATHEMATICS						
	Ability to:						
	use basic math skills						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	MATHEMATICS (cont.)						
	use numerical abilities						
	understand, tabulate, and relate statistical information to client						
	other: ______________________						
	______________________						
	MERCHANDISING						
	manage inventory items						
	stock inventory items						
	reorder inventory items						
	other: ______________________						
	______________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	match people's abilities to appropriate jobs						
	understand related principles of management and marketing						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	organize work						
	understand insurance and other policies affecting the business						
	understand store and company policies (such as dress standards)						
	recognize needs of customers and change with their needs						
	make trips on business (such as buying trips)						
	understand general business management principles						
	know different types of payments						
	know importance of groups						
	use general accounting principles						
	make out fee cards and contracts						
	handle charges, check, and cash sales						
	use cash register						
	prepare checks						
	other: ____________________						
	____________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know care of equipment (such as that of business or rented by business)						
	know services offered						
	know legal restrictions governing business						
	other: ______________________						
	______________________						
	OTHER						
	______________________						
	______________________						
	______________________						
	______________________						
	______________________						

FINAL EV[illegible]UATION FORM

Student ____________________

Training Station ____________________

Supervisor ____________________

Date ____________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong: ____________________

____

Traits which could be improved: ____________________

____

Ways in which student has improved: ____________________

____

Confidential remarks and additional comments:
(May be continued on reverse side)

____

____

____

____

____

____

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

____

Work Habits which could be improved: ____________________

____

Work Habits/Abilities which have improved: ____________________

____

Overall Evaluation:

- ____ excellent
- ____ above average
- ____ average
- ____ below average
- ____ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

Business Ownership

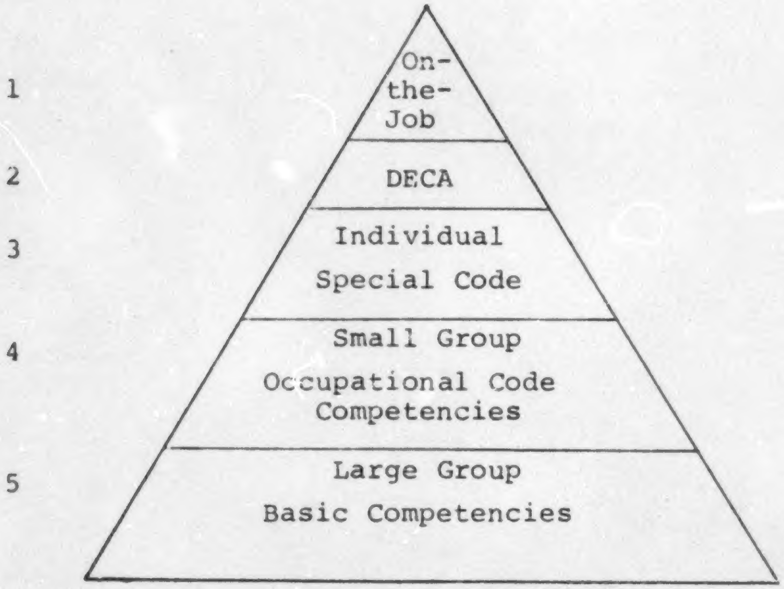
(Entrepreneurship)

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



Section 1:	Individual competencies; some identified and some written in by employer or coordinator
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Responsibilities and Job Tasks: The student is expected to do many tasks on the job. Many of these tasks are given. This list may not fully describe the job of your student/trainee so additions and deletions may be necessary.

Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: 4.21 Business Ownership
(Entrepreneur)

Student____________________________

Job Title__________________________

Occupational Description:

An entrepreneur in any small business ownership performs various marketing functions and tasks. These small businesses are engaged in merchandising products and/or services. The entrepreneur should be familiar with all facets of undertaking and running a business including finance, marketing, personnel, accounting, and general management.

Sample job tasks and responsibilities:

ADVERTISING

prepare ads and layouts
be familiar with layout techniques

COMMUNICATION

have speaking ability
use telephone properly
answer customer's inquiries
demonstrate use of product
have generally good skills in communicating with others

DISPLAY

prepare displays
know basic display techniques

HUMAN RELATIONS

face new situations
good memory of people/things
have pleasing personality
exhibit cooperative attitude
be accurate and efficient
be honest and reliable
be responsible

SELLING

know sales cycle
show initiative
prepare catalog orders
use suggestive selling
help customer choose/decide
answer customer's questions about product

MATHEMATICS

use basic math skills
figure discounts/percents
be familiar with taxes

MERCHANDISING

price items
know pricing policy
reorder stock
maintain area where stock is displayed
prepare displays of stock
help with store sales and work with seasonal items

OPERATIONS AND MANAGEMENT

work cash register
prepare sales slips
operate filing systems
process charges/layaways/and refunds
make change
handle over-rings
tabulate and analyze sales receipts
be aware of shoplifting problem
work with discounts and coupons
hire and fire employees
implement company policies
use effective communication skills
establish goals and objectives
create and work with budgets
be familiar with savings and checking accounts
reason and think effectively

PRODUCT AND SERVICE TECHNOLOGY

know product information
know procedures (shipping, storage, delivery, etc.)
know laws governing business

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	IN-CLASS SMALL GROUP	IN-CLASS IND.	IN-CLASS DECA	ON-THE-JOB
	ADVERTISING						
	Ability to:						
	prepare advertisements and layouts						
	be familiar with layout techniques						
	other: ______________						
	______________						
	______________						
	COMMUNICATIONS						
	Ability to:						
	have speaking ability						
	use telephone properly						
	answer customer's inquiries						
	demonstrate use of product						
	have generally goods skills in communicating with others						
	other: ______________						
	______________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	DISPLAY						
	Ability to:						
	prepare displays						
	know basic display techniques						
	other: ______________________						
	______________________						
	HUMAN RELATIONS						
	Ability to:						
	face new situations						
	have good memory of people and things						
	have pleasing personality						
	exhibit cooperative attitude						
	be accurate and efficient						
	be honest and reliable						
	be responsible						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	SELLING						
	Ability to:						
	know sales cycle						
	show initiative						
	prepare catalog orders						
	use suggestive selling						
	help customer choose/decide						
	answer customer's questions about product						
	other: ______________________						
	______________________						
	MATHEMATICS						
	Ability to:						
	use basic math skills						
	figure discounts and percents						
	be familiar with taxes						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	IN-CLASS SMALL GROUP	IN-CLASS IND.	IN-CLASS DECA	ON-THE-JOB
	MERCHANDISING						
	Ability to:						
	price items						
	know pricing policy						
	reorder stock						
	maintain area where stock is displayed						
	prepare displays of stock						
	help with store sales and work with seasonal items						
	other: ____________________						
	____________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	work cash register						
	prepare sales slips						
	operate filing systems						
	process charges						
	process layaways						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	process refunds						
	make change						
	handle over-rings						
	tabulate and analyze sales receipts						
	be aware of shoplifting problem						
	work with discounts and coupons						
	hire and fire employees						
	train or help train employees						
	implement company policies						
	use effective communication skills						
	establish goals and objectives						
	create and work with budgets						
	be familiar with savings and checking accounts						
	reason and think effectively						
	other: ______________________						
	______________________						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know product information						
	know procedures for shipping						
	know procedures for storage						
	know procedures for delivery						
	know laws governing business						
	other: ____________________						
	____________________						
	OTHER						
	____________________						
	____________________						
	____________________						
	____________________						
	____________________						

FINAL EVALUATION FORM

Student ____________________
Training Station ____________________
Supervisor ____________________
Date ____________________

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Traits especially strong: ____________________

Traits which could be improved: ____________________

Ways in which student has improved: ____________________

Confidential remarks and additional comments:
(May be continued on reverse side)

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
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Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong: ____________________

Work Habits which could be improved: ____________________

Work Habits/Abilities which have improved: ____________________

Overall Evaluation:
___ excellent
___ above average
___ average
___ below average
___ poor

Distributive Education Training and Development Plan

SALES AND MARKETING

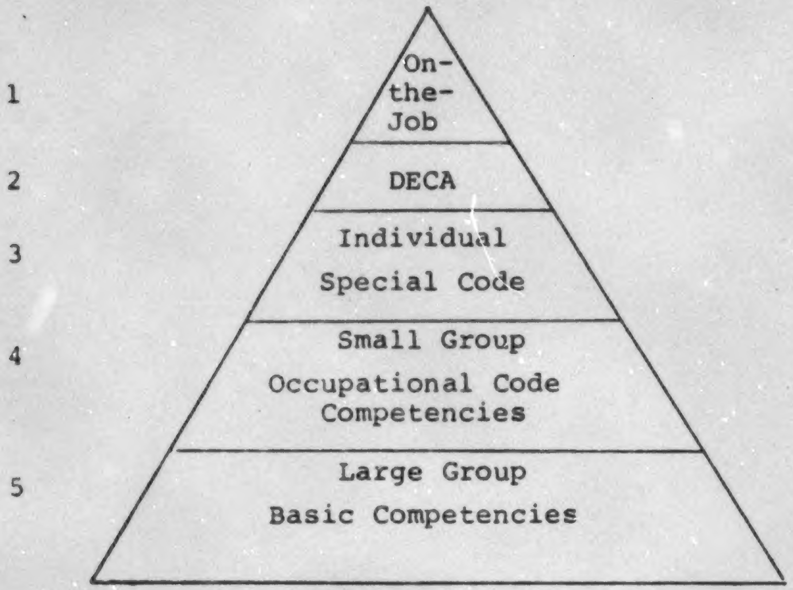
General Marketing

EASTERN WASHINGTON UNIVERSITY
School of Business Administration
Department of Business and Distributive Education

COMMISSION FOR VOCATIONAL EDUCATION
Research Coordinating Unit
Olympia, Washington

SUPERINTENDENT OF PUBLIC INSTRUCTION
Distributive Education
Olympia, Washington

TRAINING PLAN PYRAMID



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Training Plan: A training plan is a written list of competencies a student may need to master in order to hold a job in his/her desired occupational area.

OCCUPATIONAL CODE: General Marketing

Student ______________________________

Job Title ____________________________

Occupational Description:

The tasks of organizing and learning the general application of marketing functions, principles, practices, and procedures without particular emphasis to the kind of environment in which the marketing functions are performed or the kind of products or services involved. The basic knowledge, skill, and attitude developed in this occupational description are applicable in a variety of industries.

Sample job tasks and responsibilities:

ADVERTISING

- coordinates displays with advertising merchandise
- makes signs for displays
- read all current ads as well as competitors ads
- takes merchandise to advertising for store ads
- keeps results on store ads

COMMUNICATIONS

- explains care and demonstrates uses to customer
- directs customers to appropriate areas of store
- supplies customers with information over phone on merchandise
- gives customers directions to places questioned
- types letters to delinquent accounts
- types correspondence to other companies etc. for store

DISPLAY

- cleans, originates, and straightens counters and displays
- rotates stock if necessary
- replenishes stock from display
- puts up premade signs
- turns on displays and sign lights when necessary

HUMAN RELATIONS

- advises customers on new fashions, styles, trends
- adjusts customer complaints and grievances
- reports customers requests to supervisor

SELLING

- explain merchandise and demonstrates to customers
- uses cash register
- writes sales slips quickly and accurately then wraps or bags if necessary

SELLING (cont.)

- suggestive sells new or related items
- trades up sale when applicable
- helps customers establish and use credit
- carries purchases to car etc. for customers if necessary

MERCHANDISING

- keeps stock neatly arranged
- gives demonstrations
- prices and tags merchandise
- gives customers mailers who do not receive them and puts them on mailing list

OPERATIONS AND MANAGEMENT

- handles closing out procedures at day end or shift completion
- takes stock and inventory when necessary tells buyer etc. of low amounts
- trains new people

OPERATIONS AND MANATEMENT (cont.)

keeps stockroom clean
reports damaged stock to supervisor and errors in shipping
receives merchandise and readies for display
helps process billing
attends store meetings
helps with employee scheduling
helps manager as to employee needs during shifts
maintains personnel and helps with payroll

PRODUCT AND SERVICE TECHNOLOGY

knows new products and improvements available
puts store labels on merchandise also repairs if necessary
has background of all products so as to help other departments when necessary
keeps informed of advertised products
has basic mechanical ability for doing minor repairs to products sold
offers suggestions on new improvements to products or methods of handling products

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	ADVERTISING						
	Ability to:						
	coordinate displays with advertising merchandise						
	make signs for displays						
	read all current ads as well as competitors ads						
	take merchandise to advertising for store ads						
	keep results on store ads						
	other: ______						
	______						
	COMMUNICATIONS						
	Ability to:						
	explain care and demonstrate uses to customer						
	direct customers to appropriate areas of store						
	supply customers with information over phone on merchandise						
	give customers directions to places questioned						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	COMMUNICATIONS (cont.)						
	type letters to delinquent accounts						
	type correspondence to other companies etc. for store						
	other:						
	DISPLAY						
	Ability to:						
	clean, originate, and straighten counters and displays						
	rotate stock if necessary						
	replenish stock from display						
	put up premade signs						
	turn on displays and sign lights when necessary						
	other:						

			IN-CLASS				
Check if Applies	COMPETENCY	DATE COMP.	LARGE GROUP	SMALL GROUP	IND.	DECA	ON-THE-JOB
	HUMAN RELATIONS						
	Ability to:						
	advise customers on new fashions, styles, trends						
	adjust customer complaints and grievances						
	report customers requests to supervisor						
	other: ____________						
	____________						
	SELLING						
	Ability to:						
	explain merchandise and demonstrate to customers						
	use cash register						
	write sales slips quickly and accurately then wrap or bag if necessary						
	suggestive sells new or related items						
	trades up sale when applicable						
	help customers establish and use credit						

			IN-CLASS				
Check if Applies	COMPETENCY	DATE COMP.	LARGE GROUP	SMALL GROUP	IND.	DECA	ON-THE-JOB
	SELLING (cont.)						
	carries purchases to car etc. for customers if necessary						
	other: ____________________						
	____________________						
	MERCHANDISING						
	Ability to:						
	keep stock neatly arranged						
	give demonstrations						
	price and tag merchandise						
	give customers mailers who do not receive them and put them on mailing list						
	other: ____________________						
	____________________						
	OPERATIONS AND MANAGEMENT						
	Ability to:						
	handle closing out procedures at day end or shift completion						
	take stock and inventory when necessary tells buyer etc. of low amounts						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS				ON-THE-JOB
			LARGE GROUP	SMALL GROUP	IND.	DECA	
	OPERATIONS AND MANAGEMENT (cont.)						
	train new people						
	keep stockroom clean						
	report damaged stock to supervisor and errors in shipping						
	receive merchandise and ready for display						
	help process billing						
	attend store meetings						
	help with employee scheduling						
	help manager as to employee needs during shifts						
	maintain personnel and help with payroll						
	other: ____________						
	____________						
	PRODUCT AND SERVICE TECHNOLOGY						
	Ability to:						
	know new products and improvements available						
	put store labels on merchandise also repair if necessary						

Check if Applies	COMPETENCY	DATE COMP.	IN-CLASS LARGE GROUP	IN-CLASS SMALL GROUP	IN-CLASS IND.	IN-CLASS DECA	ON-THE-JOB
	PRODUCT AND SERVICE TECHNOLOGY (cont.)						
	has background of all products so as to help other departments when necessary						
	keep informed of advertised products						
	have basic mechanical ability for doing minor repairs to products sold						
	offer suggestions on new improvements to products or methods of handling products						
	other: ______________________						
	______________________						
	OTHER						
	______________________						
	______________________						
	______________________						
	______________________						
	______________________						

04.22 10

FINAL EVALUATION FORM

Student____________________________
Training Station_____________________
Supervisor_________________________
Date______________________________

INSTRUCTIONS: Indicate the appropriate degree of satisfaction for each item in (1) Traits, and (2) Work Habits/Abilities on the scale provided.

10	9	8	7	6	5	4	3	2	1	0	n/a
excellent		above average			average		below average			poor	does not apply

TRAITS

Appearance	10	9	8	7	6	5	4	3	2	1	0	n/a
Promptness	10	9	8	7	6	5	4	3	2	1	0	n/a
Cooperation	10	9	8	7	6	5	4	3	2	1	0	n/a
Sincere/Dependable	10	9	8	7	6	5	4	3	2	1	0	n/a
Interest/Attitudes	10	9	8	7	6	5	4	3	2	1	0	n/a
Courtesy/Tact	10	9	8	7	6	5	4	3	2	1	0	n/a
Self confidence	10	9	8	7	6	5	4	3	2	1	0	n/a
Attendance	10	9	8	7	6	5	4	3	2	1	0	n/a

Traits especially strong:____________________

Traits which could be improved:________________

Ways in which student has improved:_____________

Confidential remarks and additional comments:
(May be continued on reverse side)

WORK HABITS/ABILITIES

Speed/Amount of Work	10	9	8	7	6	5	4	3	2	1	0	n/a
Follows Directions	10	9	8	7	6	5	4	3	2	1	0	n/a
Accuracy	10	9	8	7	6	5	4	3	2	1	0	n/a
Works without supervision	10	9	8	7	6	5	4	3	2	1	0	n/a
Takes Suggestions	10	9	8	7	6	5	4	3	2	1	0	n/a
Selling	10	9	8	7	6	5	4	3	2	1	0	n/a
Cash Register	10	9	8	7	6	5	4	3	2	1	0	n/a
Stocking	10	9	8	7	6	5	4	3	2	1	0	n/a
Human Relations	10	9	8	7	6	5	4	3	2	1	0	n/a
Merchandise Math	10	9	8	7	6	5	4	3	2	1	0	n/a

Work Habits especially strong:_________________

Work Habits which could be improved:____________

Work Habits/Abilities which have improved:________

Overall Evaluation:

____ excellent
____ above average
____ average
____ below average
____ poor